ANNUAL MEETING GUIDE

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"The goal of the annual meeting is to provide a stimulating educational, professional, and social event that is affordable to as many members as possible."

Updated May 2017

Annual Site Selection Committee Responsibilities

Proposing to host a meeting

SSA Site Selection Committee and the Executive Board choose the location of the annual meeting from proposals submitted by members. If you are thinking about hosting first consider what your city has to offer your guests.

1. Does your city have hotel and convention facilities available?
    a. Is the location of the facility near local attractions?
    b. Are there a variety of restaurants within walking distance?
    c. Is the size of the facility appropriate?
    d. Can an affordable room rate be negotiated with the hotel?
    e. Consider vendor space carefully for maximum contact with attendees
2. Is there a major airport nearby, and if not, what kind of transportation can be used?
3. What activities could you schedule outside of the meeting?
4. What kind of local arrangements support could you garner from the area?
    a. SSA members to serve on the LAC
    b. Financial or in-kind support from local businesses

Proposals are sent to the Annual Meeting Site Selection Committee Chair in writing at least 24 months in advance of the proposed meeting. Proposals can be sent as early as 3 years out, and should include the following information:

● potential Local Arrangements Committee Chair and members (must be current SSA members to serve)
● examples of available hotel and convention facilities
● points of interest to the organization
● transportation available to and from proposed city
● Potential local exhibitors, sponsors, or donors

Proposals received by the Site Selection Committee will be presented to the Executive Board at least 15 months in advance of the proposed annual meeting. More details on the procedures of the Site Selection Committee are in the SSA Officer and Committee Procedures Manual. Preparations begin at the time of Board approval.

Timeline: Site Selection Committee

**When making changes to this Site Selection timeline, be sure to update the Timeline of Major Conference Deadlines (for all committees) at end of this guide.

2-3 years prior to conference

Site Selection Committee receives proposals

At least 2 years prior to conference

Site Selection Committee presents proposals to the Executive Board, LAC chair is appointed, and a LAC is formed

Local Arrangements Committee Composition and Duties

The function of the Local Arrangements Committee is to plan, prepare, and provide the local services necessary to conduct the annual meeting. This includes selecting the meeting location, negotiating a contract for use of meeting rooms and reservation of hotel room blocks, and arranging for any receptions, tours, transportation and publicity. The LAC can also establish a theme for the annual meeting relating to a trend or issue in the archival profession or a local event or historical topic, but this is not a requirement. The committee's primary objective is not to raise income for SSA, but to provide a stimulating educational, professional, and social event that is affordable to as many members as possible. The LAC works closely with the Annual Meeting Program Committee, chaired by the current year's SSA Vice President, and the Professional Development Committee to establish the educational portion of the meeting. The Program Committee is charged with coordinating the content of the educational sessions: sending out a call for proposals, reviewing and selecting sessions, and collaborating with the LAC to schedule them in the meeting rooms at the location. The Professional Development Committee is responsible for arranging the pre-conference education.

Appointment and Membership

The Local Arrangements Chair is appointed by the SSA President. If the Local Arrangements Chair will have a Co-Chair, the Co-Chair is also appointed by the SSA President. The chair(s) should appoint the people needed to plan and host a successful conference. The Program Committee Chair and Professional Development Committee Chair serve as ex-officio members. The necessary roles are listed below. Individual members may take on more than one role – that is the choice of the LAC members.

Term

The committee term is generally 18 months, from the time the site is selected to the final report to the Board in October following the meeting.

Reports

The LAC Chair is expected to prepare written reports for all SSA board meetings leading up to the conference, plus a post-meeting report. Budget / spending information is a required part of all LAC reports to the board.

1. Pre-Annual Meeting Planning Report: due October Board meeting
    This is a status report of the planning process to date
2. Pre-Annual Meeting Status Report: due May Board meeting
    Brief report given at the start of the Annual Meeting
3. Post-Annual Meeting Informal Report: due closing May Board meeting
    Brief report given at the end of the Annual Meeting
4. Post-Annual Meeting Financial Report: due to SSA Treasurer by August 30

The financial report must include final registration numbers

5. Post-Annual Meeting Final Report: due at October Board meeting
   Narrative review of successes and challenges and financial report

Roles and Responsibilities

The Local Arrangements Committee has a Chair and nine positions.

Chair / Co-chair

Provides overall accountability for the annual meeting and is responsible for all meeting and committee reports expenses, activities, and legal and financial commitments made on behalf of SSA. The Chair is the signatory representative for SSA.

- Organizes and appoints the members of the Committee
- Selects a suitable meeting hotel and secures the facility by negotiating and signing a contract
  - The chair must use due diligence and negotiation when working with the hotel and other vendors. Many costs are negotiable. If your LAC doesn't have the expertise to review the contracts, consider having a volunteer legal professional or event planner from the community work with you.
- Works with the Program Committee to create a daily schedule
- Works with the Professional Development Committee to coordinate the workshops
- Establishes a meeting budget and authorizes all committee expenditures and accounts for the meeting fund
- Assists with catering planning
- Prepares printed program for conference or arranges for designer to complete
- Prepares and presents all requested reports

Meeting Treasurer

Manages all meeting and committee funds, assumes responsibility for the SSA LAC bank account and completes all LAC purchasing using checks and a debit card issued to the individual by the SSA Treasurer.

- Monitors the receipt and expenditure of all funds for all meeting activities
- Monitors all general committee expenditures incurred, including PDC budget
- Works with Professional Development Committee to include pre-conference education costs in LAC budget
- Submits a preliminary budget to the finance committee (via the SSA Treasurer) for review early in the process. If costs will vary widely from that preliminary estimate, the LAC chairs, LAC treasurer, and SSA treasurer should confer.
- Pays approved expenses, makes deposits initiated by responsible subcommittee chairs, balances deposits with appropriate subcommittee databases, balances bank account
- Secures meeting cancellation insurance, if necessary
- Prepares deposits for all registration funds received by check (most will be paid online by credit card or PayPal)
- Works with the Registration Chair and the SSA Treasurer to answer questions about registration payments and issue refunds.
- Work with the SSA Treasurer to count and deposit cash from the SLOTTO table each day.
- Prepares all financial reports, including periodic reports on budgeting and spending as part of the LAC reports to the board
- Balances the account within 90 days of the end of the meeting, in cooperation with the SSA Treasurer

Computer and Audiovisual Equipment Coordinator

Ensures that all computing and audiovisual equipment necessary to conduct a successful meeting are available at the meeting site and at off-site events.

- Investigates, evaluates, and negotiates costs of using independent and hotel computing and audiovisual services contractors
- Investigates and arranges, if permissible, local institutional resources
- Coordinates equipment needs of the Facilities and Catering and Exhibitors subcommittees
- Liaisons with the Program Committee and Professional Development Committee
- If needed, recruits volunteers to be available onsite to ensure equipment is in place, operational, and troubleshoot problems as they arise
- Coordinates expenditures with LAC Treasurer and LAC Chair/Co-Chair

Facilities and Catering Coordinator

Provides facilities and refreshments that will accommodate and enhance the meeting's program and activities. This includes facility set-up, furniture and other resources needed in meeting rooms.

- Coordinates room assignments with hotel catering manager based upon estimated program requirements
- Identifies appropriate seating arrangements in designated rooms (theater style seating for sessions, vs. round tables for the Saturday breakfast meeting, for example)
- Evaluates and selects suitable food and beverage menus
- Identifies and coordinates room and catering needs of Executive Board
- Coordinates expenditures with LAC Treasurer and LAC Chair/Co-CHair
- Takes into consideration that some members may be vegetarians or require special diets such as gluten-free

Registration Manager

Manages registration and provides preliminary and onsite meeting registration information and materials to SSA members, exhibitors, sponsors, students, and other attendees.

- Creates event on SSA website for registration purposes
- Collects gift items, brochures and all official materials for preliminary and registration packets
- Compiles packets for registrants and exhibitor representatives, (registrant and exhibitor packets are the same)
- Prepares receipts and reports, including list of advance registrants and professional development rosters
- Manages complimentary/scholarship registrations
- Works with the LAC Treasurer and the SSA Treasurer to answer questions about registration payments and issue refunds.
- Records final registration information and sends the list to the Membership Chair for names of prospective members
- Solicits and schedules volunteers to provide onsite registration during meeting
- On-site: provides badges, ribbons, and special event tickets
- Records and coordinates expenditures with LAC Treasurer

Social Events, Transportation & Tours Planner

Coordinate events outside the educational program to enhance the experience and showcase local history and archives.

- Investigates unique, interesting sites both within and outside the hotel
- Obtains cost estimates and negotiates facility and catering contracts
- Coordinates theme, format, menus, and music or entertainment with appropriate LAC subcommittee or liaison
- Coordinates transportation for all events, including workshops, if necessary
- Works with Registration Manager to provide maps, guides, and other materials for registration packets
- Coordinates expenditures with LAC Treasurer

Exhibitor / Vendor and Sponsorships Coordinator

Solicits and coordinates financial sponsors and exhibitors/vendors the annual meeting. Works closely with Hotel Coordinator at the meeting.

- Solicits exhibitors and sponsors from lists of previous SSA exhibitors, local vendors and archives/libraries, and those at similar meetings
- Establishes sponsorship levels with Chair
- Solicits exhibitors from local and national institutions and vendors
- Establishes exhibit space costs and fees with Chair
- Arranges exhibit area with hotel
- Coordinates exhibit setup and teardown arrangements with hotel
- Coordinates with Registration for individual exhibitor registrations, including number of representatives
- Coordinates expenditures with LAC Treasurer and LAC Chair/Co-Chair
- Maintains contact information for exhibitors and sponsors that is passed on to the next LAC
- Collects advertisements and logos and provides them to the Publicity Coordinator or SSA Internet Committee Chair for use on the website and in the printed program
- Identifies and solicits sponsors for social events, general meeting expenses, and other meeting-related items such as:
    - registration folders or bags
    - lanyards for name tags
    - door prizes for raffles
    - beer and wine for dinner or reception
    - complimentary tickets for cash bar
    - speaker costs
    - transportation for professional development and social events
    - flowers or other decorations
- Coordinates to ensure sponsor recognition in the Final Program (and Preliminary Program if known in time) and with signs at the sponsored events during the meeting
- Coordinates with LAC Treasurer to ensure proper invoicing and receipt of funds
- President and LAC chair (s) sends acknowledgement letter to each sponsor after the meeting

SLOTTO Coordinator

Coordinate SLOTTO, a raffle which takes place at the member business meeting and raises funds for the

SSA Scholarship Fund. The SSA Scholarship Committee Chair is the primary contact for SLOTTO, the LAC SLOTTO Coordinator works closely with the Scholarship Committee Chair to ensure they have all provisions accounted for.

- Works with Scholarship Committee Chair to receive donations from SSA members and local vendors or annual meeting sponsors/exhibitors for raffle or silent auction
- Works with Scholarship Committee Chair and LAC Hotel Coordinator to secure table space throughout the meeting for display of items and silent auction as well as tables and A/V (if needed) for SLOTTO give-away at the Member Business Meeting
- Works with Hotel Coordinator to ensure shipping of SLOTTO items are received at hotel/conference center and arrive for display
- Confirms and coordinates secure overnight storage of items in the hotel/conference center
- Sells SLOTTO tickets throughout the meeting
- Confirms who will emcee the SLOTTO give-away event
- Helps display items throughout the meeting and distribute to winners at give-away event at the Member Business Meeting

Publicity Coordinator
To promote attendance by publicizing the meeting locally, regionally, and nationally.

- Consider a booth promoting the meeting at the preceding SAA meeting or other archival conferences
- Contact the local Chamber of Commerce and/or convention and visitors bureau for promotional material relating to the host city
- Write promotional articles for the SSA newsletter, local library and news outlets, and informative messages for relevant email lists beginning 12 months prior to the annual meeting. The articles should promote different aspects of the host city and its attractions, as well as meeting activities.
- For the SSA newsletter, 2-page spreads are encouraged, at 600-1200 words + PHOTOS & captions on the following schedule:
  - o November issue: Spread on upcoming annual meeting. This is typically the first announcement for the meeting and introduces members to the town, venue, meeting theme, if applicable, etc. However, incoming LAC members can submit information for the August issue if they desire. (deadline October 10)
  - o February issue: Big spread on the annual meeting – i.e. hotel rates, things to do, travel arrangements, etc. (deadline January 10) + PHOTOS & captions
  - o May issue: Information about the meeting – i.e. keynote speaker, about the location & repositories in the area, etc. (deadline April 10) + PHOTOS & captions
  - o August issue: Photos and recap from the annual meeting (deadline July 10)
- Prepares website information (in cooperation with Registration Manager)
- Is responsible for directional signage in the meeting space and other venues
- Coordinates Social Media presence for marketing conference

Establishing a budget, program, and hotel contract
The LAC Chair and Treasurer should establish a meeting budget at the beginning of the planning process. The goal of the annual meeting is to break even, not necessarily to raise income for SSA, but to provide a

stimulating educational, professional, and social event that is affordable to as many members as possible. The LAC should submit a preliminary budget to the finance committee (via the SSA Treasurer) for review early in the process. If costs will vary widely from that preliminary estimate, the LAC chairs, LAC treasurer, and SSA treasurer should confer. The SSA treasurer will initiate periodic budget check-ins with the LAC treasurer and co-chairs. These can be more or less frequent as the situation requires.

The LAC Chair and Meeting Treasurer should receive financial and other data from previous meetings as quickly as possible after the previous meeting to assist with calculating cost estimates in their locality, and establishing reasonable registration and exhibit fees that will meet these costs. The LAC Chair and Meeting Treasurer should budget for all anticipated revenue and expenses and track all actual charges and income. Final approval for all expenses sits with the LAC Chair(s), and all expenses should be reviewed and approved by more than one LAC member (either both co-chairs or chair + treasurer).

There has never been a set amount for registration fees; however a good rule to keep in mind is to make sure your registration fees per person cover all necessary expenses (including food and drink, A/V, transportation, and room costs), to the extent possible. Postage, copies, programs, envelopes, name tags and other items can also add up quickly and should be taken into account when planning your registration fees. Sponsorships and in-kind donations may help to keep some of these expenses down. When caterers quote you a per person charge a good rule of thumb is to calculate the total for 100 to 125 people, and adjust as actual registration numbers come in. You generally will not have to lock in any menu orders until closer to the conference date, when you should have a good idea of the number of attendees. Most hotels will give meeting space for free if you hit a certain dollar amount for catering. Look at these numbers closely – if you need a Wednesday night opening reception to hit the catering numbers, go for it. If you'll hit the catering numbers through breaks and the Saturday breakfast, a Wednesday night reception isn't required or may be able to be held outside of the hotel for less money. Drink tickets are a nice surprise, but shouldn't be provided unless there is money in the budget.

The hotel will charge you tax and gratuity on catered events (and sometimes on other things too). Ask the hotel and all vendors to recognize SSA as tax-exempt at the beginning of your dealings with them, to avoid last minute surprises. You can get a copy of SSA's tax-exempt certificate from the Treasurer. Formal tax exemption status for SSA was procured in Texas in 2015, but research and applications may be necessary in other states.

The tours and pre-conference workshop fees are separate from the registration fees. Work with the Professional Development Chair to set the pre-conference workshop fees, which must cover breaks, audio/ visual equipment, and any speaker fees. The charge for tours will be decided by the Local Arrangements Committee based on the price of the tour.

A/V and Wifi costs can sink a budget. See if the hotel will allow you to bring your own equipment and/or provide your own technical support. Depending on the resources of your community, these could be donated by a local repository or university for use during the conference. If A/V costs are non-negotiable, look for an outside sponsor to help defray the cost or use the inflexibility of A/V costs to negotiate other costs down (meeting rooms, service fees, vendor tables, wifi, hotel rooms, catering,

etc.). You will need to work with the Program Chair to get specific A/V needs for each session.

When the LAC Treasurer receives the bank documents the account will have a start-up fund of $1,000. The account will also have $1,000 in start-up funds for the PDC. This $2,000 should be returned to the general account after the meeting.

Income consists of registration fees, exhibitor fees, and sponsorships.

Gathering data

The LAC Chair should contact the SSA Treasurer for information acquired from previous meetings. The Treasurer can provide sample spending from previous LACs for various categories of meeting expenses. See also the historical spending data as well as the budget and account templates at the end of this document.

Identifying meeting expenditures

To establish the registration fees, it is essential that the LAC Chair has a thorough understanding of the expected costs of the meeting. These include:

- Hotel charges for meeting space, exhibitor hall, catering, A/V rental and Internet access, all applicable taxes, gratuities, and service charges
- Institutional and/or commercial suppliers of computer and A/V equipment
- Off-site venue rental for social events, including catering, group transportation, entertainment, and all applicable taxes, gratuities, and service charges
- Program printing costs
- Supplies (nametags/badges, directional signage at conference site, etc.)
- Plenary speaker honorarium
- Event Insurance (if applicable)
- Professional Development Committee expenditures

Estimating meeting income

The primary sources of income for the meeting are registration fees, exhibitor fees, and sponsorships.

Registration fees

Historically, the registration fees for the meeting are set at a level sufficient to pay for the cost of the meeting. Fees from the last several meetings can be used as a starting guide, adjusted as necessary for the location, time of year, and local market conditions. In general, all persons attending the meeting, including presenters, must pay the registration fee and any additional fees for meals, workshops, or receptions unless they receive an exemption from the LAC chair. Scholarship winners will receive free registrations and a limited number of student volunteers may also have their registrations comped. Exceptions are made only with the approval of the Program Chair.

Any registration or workshop fees that come in through Paypal via Wild Apricot will be assessed a fee (2.2% of the total + $0.30 per transaction). This fee should be anticipated by the LAC in the budgeting process and tracked and managed by the Meeting Treasurer, with assistance from the SSA treasurer.

Checks or cash payments will not have any fees assessed.

Exhibitor fees

The exhibitor fees charged to vendors should generally be set based on amounts collected in previous years. Fees should pay for all expenses incurred in exhibiting at the meeting, (draped tables in the hotel, access to electricity, internet access, etc.)

Sponsorships

Sponsorships and in-kind donations should be sought for highly visible expenses, such as receptions, tours, lanyards / badges, or program printing. These can have a significant effect on the budget by reducing or eliminating certain meeting costs.

Fees for exhibitors/sponsors are set by the LAC Treasurer, Chair/Co-Chair, and Exhibitor/Sponsorship Coordinator well in advance of the registration fee and include opportunities to sponsor snack breaks, drink tickets, or speakers fees. These sponsorship amounts may be approximations of actual costs.

Advertisements

In addition to ads provided in tiered sponsorship packages, some vendors/exhibitors may not be able to attend meeting or sponsor program but may be willing to place an ad in the program. Local business or organizations with a related mission to SSA could also be solicited for program advertising.

Registration Fee Categories

The following illustrates the variety of fees that are available for the LAC to use at the meeting. These have been developed to accomplish various goals: to encourage timely registration so the LAC can accurately estimate income and attendance, to promote membership in SSA, to lower attendance costs for students and retirees, to encourage attendance by non-SAA members, or to maximize participation in special events and meal functions.

Early-bird fee

Setting the Early-bird registration 6-8 weeks prior to the annual meeting will allow for more accurate catering counts and estimates of attendance. The Early-bird is generally 10-15% lower than the normal rate, both member and non-member.

SSA member fee

Member rates apply to current members of SSA.

Non-SSA member fee

To encourage membership within the region, the Non-SSA member fee should be significantly higher than the combined cost of SSA membership and member registration fee: i.e. approximately 20-25% higher than the member registration fee. Consider the annual membership dues as a benchmark.

One-day, Student, and Retiree discounted fees.

A one-day registration fee can be provided at approximately 30% of the full conference member registration fee. The one-day registration fee is not required for those wishing to only attend a workshop. This also gives the option to larger institutions to send a variety of people on different days, and still have coverage at work.

There may be discounted registration fees for certain classes of members, or non-members. Only full-time Library School Students should qualify for Student registration. Students or other volunteers may be given free or reduced meeting registration in exchange for working at the meeting. Retirees and students should pay full-price for all ticketed events to cover costs.

Guest fees

Registrants can pay a fee for a guest to accompany them to the all-meeting reception, business meeting breakfast, or other social events. This fee should be set by the LAC to reflect actual per-person costs for the event.

Late fees

To encourage early registration, the Late Registration Fee should be approximately 30% higher than the early registration fee and should take effect 4 weeks prior to the meeting. You'll need to give attendance numbers to caterers about two weeks out, so encourage people to register early.

Refunds

Full refunds for annual meeting and workshop registrations are available no less than 10 business days prior to the first day of the annual meeting. Refunds requested after that date will incur a $25 penalty.

Processing Fees

All returned checks should be charged a $25 processing fee in addition to the applicable bank fees.

Hotel/Conference Center Contract

This is the most important part of the conference, because this is where your guests will spend the majority of their time. You need to find a place that is comfortable and within easy walking distance to a number of restaurants and shops. The conference rooms should be roomy, but not so large that your speakers will become lost. Consider vendor/exhibitor placement for optimum attendee contact. Schedule one local arrangements committee meeting in the hotel restaurant to sample the food and let committee members walk around the hotel. You will usually work with three different people at the hotel: the Sales Manager, the Catering Manager and a Hotel Liaison. The Hotel Liaison will work with you during the actual conference to supervise room set-ups and provide you with last minute requests. The Catering Manager will work with you on all meals planned for inside the hotel, such as breaks, luncheons and the business breakfast.

The Sales Manager will schedule the room availability and conference meeting space. This will be your first contact. Bring with you the statistics from the last five years of meetings, including dates, locations, hotels, and the number of registered participants.

The Annual Meeting is generally held in May, although the actual weekend has varied. When you schedule the dates for the Annual Meeting, take into consideration hotel availability (can you get a better price for having it on a different weekend), and local community events such as high school and university graduations. In recent years, SSA has received a better hotel rate when hosting the meeting the Friday and Saturday before Memorial Day.

The Sales Manager will ask how many rooms or nights you think SSA will need for the conference. You will need to calculate how many registered participants you think will attend and how many nights they will stay. Hotel room nights are calculated for each hotel room occupied for each night, so if you have an average of 150 registrants staying at the hotel and they stay an average of three nights, you will need 450 room nights. Here are examples of actual annual meeting data showing room nights actualized.

Meeting Day	2016 OKC	2015 Arlington	2014 New Orleans	2013 Austin
Tuesday	30	29	46	28
Wednesday	76	97	119	72
Thursday	80	107	121	86
Friday	79	88	110	76
Saturday	9	4	28	12
TOTAL room Nights	**274**	**325**	**427**	**278**
TOTAL registrants	215	228	196	311

There are penalties if SSA fails to meet a set percentage (often 80%) of the total number of contracted room nights. This number will vary depending on the hotel. Reserving enough rooms is important, because if your reserved block is too small and fills quickly, attendees may not get the lower conference rate, and they will have to look for rooms at other hotels. Filling the reserved block of rooms can also earn complimentary room nights. Remember these are room nights and are counted individually just as the reservations are. One person staying for the entire meeting will require 4 or 5 room nights. The free rooms are distributed as determined by the LAC Chair, traditionally to the sitting president, LAC Chair/Co-Chair, or Plenary Speaker.

Make it a point to ask the Sales Manager about the costs of the meeting room space. Some hotels will waive the meeting room fees if you meet the guaranteed number of nights that SSA guests stay at the hotel. Many hotels will require spending a certain minimum in catering/food in order to get the lowered room rate and comped or reduced-rate meeting facilities.

Hotels charge extra for a number of items that may or may not be mentioned to you in your initial meeting. This includes a set-up charge for each meeting room, exhibitor tables, the registration table, electrical hookups for these tables (when needed), audio-visual equipment, and an internet connection. A standard percentage is added for gratuity on many hotel services, not just limited to food and drink. It's important to understand all the possible charges at the start of your work with the hotel.

Vendors will need space in the hotel for their displays. If they are set up in a hallway, they will need a secure area to store their materials in the evening. If the vendors are housed in a conference room, consider where the breaks will take place to encourage the flow of traffic to the vendors. Vendors are a source of financial support for the meeting. Some vendors may want to ship materials to hotel in advance of the meeting, so the LAC should ask hotel about shipping logistics, if this is possible.

Hotel Contract should include:
● Number of guest rooms needed per night
● Price of rooms plus related taxes
● Number of meeting rooms and seating capabilities.
● Terms of waiver of meeting room charges
● Date when guest rooms will be released for general sales
● Cancellation information
● Terms of internet access for guest rooms and meeting rooms
● Terms of complimentary room nights, if any

Work with the Program Chair to require speakers to turn in a list of their A/V needs far in advance. You can schedule which equipment will be in which meeting room if you know their needs.
Depending on the structure of the session, each meeting room will things like at least one podium, with a light and microphone, two tables with a total of four chairs, and two pitchers of water with glasses.
The program schedule is determined by the LAC, times and dates for conference elements are subject to the specific needs of the host city and venue. The example program below is a suggested format based on past conferences. The LAC should consider time slots for happy hours, meet-ups, lunches, and other networking events outside the educational sessions and plenary events. A time slot for a student poster session that is unopposed by an educational session should be allotted, considering the traffic flow of attendees and allowing for maximum exposure. Students may need accommodations for posters such as easels or tables, power for electronic displays should be offered if all can be accommodated.

Example Program

Wednesday	Day 1 Professional Development pre-conference workshops or tours, Board Meeting, opening reception (optional)
Thursday	Day 2 Plenary session, program content, student poster session, possible event or tours, possible reception or SNAP event
Friday	Day 3 Program content, all attendee reception. SSA typically offers "SSA Past, Present & Future" in a morning slot with nothing opposing it.

Saturday	Day 4 Business Meeting breakfast, program content, Board Meeting

Conference Planning Timeline Planning: Local Arrangements Committee

In the early planning stages, more than 12 months before the meeting date, the LAC commonly meets as needed to organize itself and accomplish its preliminary goals. During the year preceding the meeting, the LAC generally will meet monthly, accelerating to weekly meetings as activity increases and deadlines concentrate in the last few months. Minutes of the LAC meetings should be kept to document decisions and assignments. Supporting documents, spreadsheets, and databases should be retained for possible use by future LAC's.

This schedule can be adjusted as necessary to accommodate particularly popular locations that require earlier than normal meeting and room registration deadlines.

When making changes to this timeline, be sure to update the Timeline of Major Conference Deadlines (for all committees) at the end of this guide

36-18 months before the conference

LAC finds host institution. LAC Chair issues a Letter of Intent for Executive Board approval.

24 months

LAC Chair is a non-voting member of Board and may attend Board meetings during this period and up until final report is made the fall board meeting following the conference.

12-18 months

LAC explores hotels, meeting dates determined, a contract negotiated, sent for Board Approval

12-18 months

LAC attends previous annual meeting for ideas, meeting theme determined, and publicity begins. LAC usually presents on the upcoming meeting at the business meeting the year before.

12 months

LAC works with Web Committee to create page on website for the conference with initial information including location and dates and the meeting theme.

June

Theme, conference description, and artwork needs to be ready to be provided to Program Committee to use when they make a call for proposals.

July – November the year prior the annual meeting

LAC works with SSA Treasurer to transfer authorization for the LAC account over to the LAC Treasurer.

LAC submits preliminary budget to the SSA Treasurer for review by the finance committee.

Solicit sponsorships and vendors.

August

LAC submits mid-year report to Executive Board, which includes overview of event and initial budget.

LAC sends "Save the Date" correspondence to possible vendors informing them of conference date, theme, and costs.

November - December

LAC sets registration fees, discounts, and deadlines; special event costs; exhibit fees; and sponsorships received to date should reviewed.

December

LAC determines the number of vendor tables available, solicits vendors and sponsors, and provides them with a deadline of late March.

Early January

LAC submits program synopsis, with plenary speaker (if known), and other details for the February newsletter (January 10 deadline)

January

LAC works with Web Committee to post preliminary program with special events, pre-conference workshops, and registration form to the SSA website. Registration is open.

Mid March

Deadline for exhibit booth cancellations (no refunds). Final list of sponsors and exhibitors due.

March - April

Deadline for hotel registration, based on hotel's date to release room block.

March - April

Deadline for early meeting registration rate.

3 weeks prior to conference

LAC submits computer/AV and room set-up requests to conference center/hotel.* (*these deadlines will be set by conference center/hotel)

1 week

LAC receives final catering orders and submits orders to conference center/hotel. * (*these deadlines will
be set by conference center/hotel)

1 day

LAC holds pre-conference meeting with hotel staff.

Meeting + 30 days

LAC Receive final invoices for meeting expenses.

Meeting + 90 days

LAC final meeting financial report due.

Fall Board Meeting

LAC final report due.

Professional Development Committee

Education offered on the day before the first day of sessions is organized by the Professional Development Committee (PDC). Expenditures and revenues are tracked by the LAC Treasurer with the assistance of the PDC Chair. Their responsibilities detailed here are specific to the annual meeting. The year-round responsibilities of the PDC are detailed in the SSA Officer and Committee Procedures Manual. A member of the LAC will serve as the PDC liaison in order to facilitate this partnership.

Finances

All financial receipts and disbursements for pre-conference workshops, including registration and travel expenses, should be processed through the LAC treasurer. The PDC chair should work closely with the LAC to determine fixed costs for the pre-conference workshops (including A/V, refreshments, and meeting space) as soon as possible. These can vary widely from venue to venue. Workshop registration rates should be set high enough to cover these costs, within reason.

Professional development workshops, symposiums, classes, and programs planned and conducted by the Committee should be self-supporting. If there are not enough registrants to cover the costs of the program, then the program should be canceled and registration fees refunded if possible. Excess revenue generated by an educational program should be used to help fund future programs.

The Society can reimburse instructors for expenses incurred in modest commercial travel, food, and lodging, depending on the PDC revenue and expenses. Speakers may also receive an honorarium. Reimbursement and honoraria will be negotiated with the presenters by the LAC chair. All receipts must be submitted to the LAC Treasurer as quickly as possible. Ground transportation may be provided by local members.

The Professional Development Committee will receive $1000 in "seed money" at the start of each year to assist with start-up costs for workshops. This money is part of the secondary checking account that the PDC shares with the Local Arrangements Committee. It is expected that this "seed money" will be paid back by the end of the fiscal year through workshop receipts.

Conference Planning Timeline: Professional Development Committee

12 months before annual meeting

PDC chair attends annual meeting to start gathering ideas for next year's pre-conference workshops. Make a public plea/announcement for workshop topics and/or trainers during the Business Meeting

June-July

Provide workshop attendees with ACA certificates

August-December prior to annual meeting

Solidify workshop ideas and instructors for the next year's pre-conference workshops. Shoot for three workshops, plus Archives 101. Solicit ideas from Membership survey. Receive Leadership and board approval for workshops.

October

Submit workshop plans and committee activities to board

December

Announce and advertise pre-conference workshops on SSA website, Facebook page

January-February

Include pre-conference workshop descriptions in quarterly newsletter report
Advertise workshops on Archives, Regional list-servs

Set budget for workshops working with LAC to determine costs for refreshments, A/V or room fees.

March-May

Work with LAC to make sure everything is set for pre-conference workshops (A/V needs, refreshments, workshop materials, transportation for any off-site workshops, etc).
Advertise heavily to members and to appropriate outside groups, societies, geographic areas, etc.

Monitor workshop registrations, update trainers with information regarding #s specifically when minimum or maximum registrations are met. If workshops fail to meet minimum registrations contact trainer regarding any flexibility on workshop numbers.

Contact ACA regarding certification credits for pre-conference workshops

Monday week of Conference

Contact trainers with detailed list of workshop registrants, information on reimbursements, contact information for chair and PDC chair whereabouts Tuesday PM and Wednesday, evaluation form information

Contact workshop attendees: email confirmation of registration, email with workshop location details week of conference

Wednesday
PDC chair and/or liaison present on Wednesday to assist trainers/LAC, bring evaluations for trainers, sign-in sheet for workshops

Conference + 30 days
PDC confirms with LAC to make sure trainer expenses have been reimbursed, honoraria paid.

Annual Meeting Program Committee

The meeting sessions are selected and scheduled by the Annual Meeting Program Committee with the help of the PDC and the LAC. A member of the LAC will serve as the Program Committee liaison in order to facilitate this partnership.

The Program Committee is responsible for putting out the call for conference session proposals, student poster proposals, selecting and scheduling sessions, and providing the information that LAC needs to produce the conference program.

The conference session proposal form should:

- define the role of the session proposer as primary point of communication between Program Committee and the other session members
- define the role of chair as session time keeper and the one responsible for introductions during the session
- request abstracts of the length required in the program
- determine presentation needs, such as laptop, projector, or other AV needs
- state that all presenters will be required to be registered for the day of the conference they are presenting

The Program Committee chair acknowledges and tracks receipt of proposals.

The Program Committee communicates with session proposers, chairs, and speakers throughout the processes to make sure everything is in order. The committee may be called upon to replace a session that drops out or assist in replacing presenters who pull out of a session (ongoing).

Student Poster Session duties:

The Program Committee will create and distribute a call for student posters, to be included on the schedule of the conference as determined by the LAC. The student poster session location, time, and logistics are managed by the LAC, but the proposals are managed by the Program Committee in the same manner as the conference educational sessions.

The call for posters should include:

- all information about the time, date, location of the conference and poster session
- accommodations for poster presentation area (tables/easels/power outlets)
- a description of the conference theme, if applicable, with examples of suggested topics
- a deadline for proposal submission and a notification date for students
- specific requirements for proposal
- size and dimension requirements for posters

The duties outlined in the Timeline below are the responsibility of the Program Committee.

Conference Planning Timeline: Program Committee

**When making changes to this Program Committee timeline, be sure to update the Timeline of Major Conference Deadlines (for all committees) at the end of this guide

By end of June the year prior to the annual meeting

The Program Committee chair selects a committee of between six and eight members and aims for diversity in state and type of institution.

Program Committee obtains annual meeting theme and artwork from LAC to be included in the call for proposals to be included in the newsletter and on the SSA website.

Early July

Program Committee submits call for session proposals and the session proposal form to Web Committee to be posted to the SSA website and sent to all members via SSA listserve. Information on proposal form requirements in section above timeline.

Theme & call for session proposals submitted for August newsletter (due July 10).

Early October

Program Committee submits a second/final call for proposals for November newsletter (due October 10).

October/November

The Program Committee communicates with Local Arrangements on hotel space and room availability times, A/V equipment arrangements, wifi, and on any local repository tours that will be offered during the meeting. This information will be necessary for Program Committee to determine how many session slots will be available. The session template can be set up at this time. (See Appendix for session template.)

The Program Committee chair works with Web Committee to send a reminder out to membership via listserv and social media two weeks before proposals are due (late October/early November).

The program Committee receives proposal submissions; the deadline generally occurs the week before Thanksgiving.

The Program Committee reviews proposals after the due date in mid November. It may be necessary to assist in putting a session together, by suggesting a second or third presenter. This is especially true with single papers. Not all session proposals are complete; if the idea is considered to be good and worth the

effort the committee may need to work with the session proposer to turn the idea into a complete session. (See appendix for evaluation form.)

Late December/early January

The Program Committee reviews and selects winning proposals and lets session proposers know if their proposal has been accepted or not.

The Program Committee submits session descriptions (either the Schedule at a Glance if finished or selected sessions highlighted) for February newsletter (due January 10). If preliminary schedule is submitted it should state that the schedule is subject to change.

January the year of the annual meeting

The Program Committee communicates A/V needs to Local Arrangements committee.

Program Committee creates and distributes a call for student posters, review and select posters and notify students.

Early February

The Program Committee chair works with Web Committee chair to post a schedule at a glance to the SSA website. Preliminary schedule should state that it is subject to change.

April (or as determined by LAC)

Program Committee furnishes session descriptions with speakers' names, institutions, and the titles of their presentation, audiovisual needs, as well as other appropriate information, to the chair of the Local Arrangements Committee by date set by the Local Arrangements Committee for printing of the final program.

Early April

Program Committee submits schedule at a glance and brief article on program committee activities for May newsletter (due April 10).

At the Annual Meeting

Program Committee chair will prepare and print a meeting evaluation form (see appendix) and distribute at the Saturday morning business meeting.

Within two weeks after the annual meeting

Program Committee will distribute an online meeting evaluation survey to conference attendees to fill out if they did not fill out the paper one at the business meeting.

Within a month after the annual meeting

Program Committee chair will review SSA guide to make sure all is accurate and up to date, schedule time to share documentation and procedures with incoming Program Committee chair, and send any requested changes to procedures sent to SSA secretary.**Presented at fall Board Meeting following the Annual Meeting**

The Program Committee chair collates the meeting evaluation results and provides a summary report to the Board, current LAC chair, and the following year's LAC chair.

Board Meetings

The Annual Meeting signals the annual turnover of SSA leadership. The sitting President will end their term and VP/President Elect will begin their term at the Member Business meeting, customarily held on Saturday morning with a catered breakfast.

A Board meeting is held at the start of the annual meeting, with reports are given by Officers and Committee Chairs. The meeting is held in the hotel/conference center and generally has a block of four hours and is provided a catered lunch. Depending on the number of Ad Hoc Committees, the attendance ranges from 22-26. The LAC Hotel Coordinator should work with the SSA President and/or Secretary for Board Meeting arrangements.

A second Board Meeting is held at the close of the meeting, hosted by the incoming SSA President. The purpose of this meeting is to welcome incoming Officers, Board members, and Committee Chairs. It can be attended by both the outgoing and incoming members, or just the incoming. This meeting is generally two hours and may also include a catered lunch, these options are at the discretion of the incoming President.

Catering costs for all board meetings during the annual meeting are generally covered by the LAC.

Timeline of Major Conference Deadlines (for all committees)

**If you make a change to this timeline, be sure to update the timeline in the corresponding committee section.

- Site Committee responsibilities in blue
- LAC responsibilities in purple
- Program Committee responsibilities in green
- PDC responsibilities in red

2-3 years prior to conference

Annual Site Selection Committee receives proposals.

36-18 months before the conference

LAC finds host institution, LAC Chair issues a Letter of Intent for Executive Board approval.

At least 2 years prior to conference

Site Selection Committee presents proposals to the Executive Board, LAC chair is appointed, and a LAC is formed.

24 months

LAC Chair is a non-voting member of Board and may attend Board meetings during this period.

12-18 months

LAC determines meeting dates, explores hotels, negotiates a contract and sends for Board Approval.

LAC attends previous conference for ideas, meeting theme determined, and publicity begins. LAC has the opportunity to promote the next year's meeting with a brief presentation, verbal or AV, at the Membership Business meeting breakfast.

12 months

LAC works with Internet Outreach Committee to create page on website for the conference with initial information including location, dates, theme, and conference hotel.

PDC chair attends annual meeting to start gathering ideas for next year's pre-conference workshops. Make a public plea/announcement for workshop topics and/or trainers during the Business Meeting.

June the year prior to the conference

LAC has theme, conference description, and artwork prepared for the Program Committee to use when they make a call for proposals.

By end of June

The Program Committee chair selects a committee of between six and eight members and aims for diversity in state and type of institution.

Program Committee obtains conference theme and artwork from LAC to be included in the call for proposals to be included in the newsletter and on the SSA website.

Early July

Program Committee submits call for session proposals and the session proposal form to Web Committee to be posted to the SSA website and sent to all members via SSA listserve. Information on proposal form requirements in Program Committee section of this guide.

Theme & call for session proposals submitted for August newsletter (due July 10).

July – November the year before the conference

LAC works with SSA Treasurer to transfer authorization for the LAC account over to the LAC Treasurer.

LAC submits preliminary budget to the SSA Treasurer for review by the finance committee.

Solicit sponsorships and vendors.

August

LAC sends mid-year report to Executive Board, which includes overview of event and initial budget.

LAC sends "Save the Date" correspondence to possible vendors informing them of conference date, theme, and costs.

Early October

Program Committee submits a second/final call for proposals for November newsletter (due October 10).

October/November

The Program Committee communicates with Local Arrangements on hotel space and room availability times, A/V equipment arrangements, wifi, and on any local repository tours that will be offered during the meeting. This information will be necessary for Program Committee to know how many session slots will be available. The session template can be set up at this time. (See Appendix for program template.)

The Program Committee chair works with Web Committee to send a reminder out to membership via listserv and social media two weeks before proposals are due.

The Program Committee receives proposal submissions; the deadline generally occurs the week before Thanksgiving.

The Program Committee reviews proposals after the due date in mid November.

PDC solidifies workshop ideas and instructors for pre-conference workshops. Shoot for three workshops, plus Basics of Archives (Archives 101). Solicit ideas from Membership survey. Receive Leadership and board approval for workshops.

November - December

LAC sets registration fees, discounts, and deadlines; special event costs; exhibit fees; and sponsorships received to date should be reviewed.

December

LAC determines the number of vendor tables available, solicits vendors and sponsors, and provides them with a deadline of late March.

Late December/early January the year of the conference

The Program Committee reviews and selects winning proposals and lets session proposers know if their proposal has been accepted or not.

The Program Committee submits session descriptions (either the Schedule at a Glance if finished or selected sessions highlighted) for February newsletter (due January 10). If preliminary schedule is submitted it should state that the schedule is subject to change.

PDC announce and advertise pre-conference workshops on SSA website, social media.

Early January the year of the conference

LAC submits program synopsis, with plenary speaker (if known), and other details for the February newsletter (January 10 deadline).

January

The Program Committee communicates A/V needs to Local Arrangements committee.

The Program Committee creates and distributes a call for student posters, review and select posters and notify students.

LAC works with Web Committee to post preliminary program with special events, pre-conference workshops, and registration form to the SSA website. Registration is open.

PDC works with LAC to set budget for workshop, determine costs for refreshments, A/V or room fees.

Early February

The Program Committee chair works with Web Committee chair to post a schedule at a glance to the SSA website. Preliminary schedule should state that it is subject to change

Mid March

Deadline for exhibit booth cancellations (no refunds). Final list of sponsors and exhibitor.

March - April

Deadline for hotel registration, based on hotel's date to release room block.

Deadline for early meeting registration rate.

PDC works with LAC to make sure everything is set for pre-conference workshops (A/V needs, refreshments, workshop materials, transportation for any off-site workshops, etc).
Advertise heavily to members and to appropriate outside groups, societies, geographic areas, etc.
Contact ACA regarding certification credits for pre-conference workshops.

Early April

Program Committee submits schedule at a glance and brief article on program committee activities for May newsletter (due April 10).

April (or as determined by the LAC)

Program Committee furnishes session descriptions with speakers' names, institutions, and the titles of their presentation, audiovisual needs, as well as other appropriate information, to the chair of the Local Arrangements Committee by date set by the Local Arrangements Committee for printing of the final program.

3 weeks prior to conference

LAC submits computer/AV and room set-up requests to conference center/hotel.* (*These deadlines will be set by conference center/hotel)

1 week

LAC receives final catering orders and submits orders to conference center/hotel. * (*These deadlines will be set by conference center/hotel.)

PDC contact trainers with detailed list of workshop registrants, information on reimbursements, contact information. Contact workshop attendees with confirmation of registration, workshop location details.

1 day

LAC holds pre-conference meeting with hotel staff.

PDC chair and/or liaison present on Wednesday to assist trainers/LAC, bring evaluations for trainers, sign-in sheet for workshops

At the Conference

Program Committee chair prepares and distributes printed meeting evaluation form at the Saturday morning business meeting (see Appendix for sample form).

Conference + 15 days

Program Committee distributes an online meeting evaluation survey to conference attendees to fill out if they did not fill out the paper one at the business meeting.

Conference + 30 days

LAC Receive final invoices for meeting expenses.

Program Committee chair will review SSA guide to make sure all is accurate and up to date, schedule time to share documentation and procedures with incoming Program Committee chair, and send any requested changes to procedures sent to SSA secretary

PDC confirms with LAC to make sure trainer expenses have been reimbursed, honoraria paid.

Conference + 90 days

LAC final meeting financial report due

Fall Board Meeting

LAC final report due

The Program Committee chair collates the meeting evaluation results and provides a summary report to the Board, current LAC chair, and the following year's LAC chair

Appendix: Forms and Templates

Past costs

This is a collection of approximate costs for expenses that come up at every meeting. It is meant to provide some guidance for the LAC for budget planning and price negotiating purposes. Every meeting is a little different, so your costs may vary. At the end of each meeting, this table should be updated to include the costs from the current year.

	Keynote speaker	Hotel A/V	Pre-conference workshop presenters
2016 (OKC)	$500	$445/room/day	$1,185 honoraria, travel, space rental
2015 (Arlington)	$500	$7,641 (includes 22% tax)	$900 honoraria and supplies
2014 (New Orleans)	$1,000	$5,392 total	$516
2013 (Austin)	$1,000 (covered by sponsorship)	$456 (were able to borrow projectors, provide own A/V support. Carts were provided free of charge.)	$250 honoraria, no travel costs provided

Expense type	Amount (Budget)	Sub-total (Budget	Amount (Actual)	Sub-Total (Actual)	NOTES
Food					
Board Lunch (Wednesday)					
Workshop breaks					
Wednesday Welcome Reception					
Reception drink tickets (OPTIONAL)					
Thursday all-day breaks					
Friday all-day breaks					
Friday Reception					
Reception drink tickets (OPTIONAL)					
Saturday Breakfast					
Board lunch (Saturday)					
20% service charge for hotel events					
Food Totals		$0.00		$0.00	
Audio/Visual					
LCD Projectors and Carts					
Microphones					
Screens					
White board for SAA workshop					
Wireless lavalier mic					
4 Channel Mixer					
Service fee					
A/V total		$0.00		$0.00	
Transportation					
Repository tours / Reception					
Transportation to/from satellite hotel					
Transportation total		$0.00		$0.00	
Conference					
Speaker Fees					
Exhibitor tables					
Exhibitor tables: Service fee					

Expense type	Amount (Budget)	Sub-total (Budget	Amount (Actual)	Sub-Total (Actual)	NOTES
Friday Reception					
Friday Reception, additional cocktail tables					
Directional signage					
Conference totals:		$0.00		$0.00	
Supplies					
Program printing					
3-color badge inserts					
Lanyards					
Badge holders and ribbons for LAC and Volunteers					
Ticket roll for drink tickets					
Postage					
Misc. supplies					
Supplies total		$0.00		$0.00	
Additional Expenses					
Day trips					
Paypal transaction fees					
Return seed money to SSA	$1,000.00		$1,000.00		
Additional expenses total		$1,000.00		$1,000.00	
Total Expenses:		**$1,000.00**		**$1,000.00**	
Estimated # of Attendees:	###				

Revenue type	Amount (Budget)	Sub-total (Budget)	Amount (Actual)	Sub-total (Actual)	NOTES
Conference Registrations					*SAMPLE NUMBERS FROM AUSTIN MEETING IN 2013 - Replace with current registration fee, estimated attendees, and actual attendees*
Early Bird, member (128 at $ 140)	$17,920.00		$19,880.00		*142 [+1 comp] (141)*
Early Bird, nonmember (12 at $165)	$1,980.00		$1,650.00		*10 [+1 comp]*
Early Bird, student (8 at $85)	$680.00		$2,890.00		*34 [+7 comp]*
Regular, member (15 at $165)	$2,475.00		$3,630.00		*22 (23)*
Regular, non-member (2 at $190)	$390.00		$2,090.00		*11 [+1 unpaid, no-show]*
Regular, student (4 at $105)	$420.00		$630.00		*6*
Single day (6 at $105)	$630.00		$1,890.00		*18*
SSA Workshop registrations					
Friday Reception, guest tickets					
Late cancellation penalty					$25 fee for < 1 week cancellation notice
Day Trip Registrations (? At ?)	$0.00		$0.00		This line will zero out with expenses
Registration totals		$24,495.00		$32,660.00	
Other Revenue					
Seed money from SSA	$1,000.00		$1,000.00		
Sponsorships					
Exhibitors (@ $350/each)					
Advertisers					
In-kind donations					
In-kind donations					
Other Revenue totals:		$1,000.00		$1,000.00	
Total Revenue		$25,495.00		$33,660.00	

Estimated # of Attendees:					
Registered # of Attendees (paid):					
Registered # of Attendees (unpaid):					
Registered # of Attendees (comped):					
Exhibitor (not attending):					
Total (not including single days):	0				
Single day (Thursday):					
Single day (Friday):					
Single day (Saturday):					
Opening Reception RSVPs:					
Friday Night Reception RSVPs:					
Saturday Breakfast RSVPs:					
Workshop only:					

Category	Total (Budget)	Total (Actual)	NOTES
Revenue	$25,495.00	$33,660.00	Includes in-kind donations
Expenses	$1,000.00	$1,000.00	Includes in-kind expenses
Total Cash Profit/Loss	$24,495.00	$32,660.00	

Deposit/Debit Date	Check No.	Check Date	Description	Debit	Credit	Total	Notes [Gray rows are for example only, delete before starting your accounts]
8/21/2012			Seed money from SSA		$1,000.00	$1,000.00	
8/23/2012			Bat stickers	($94.89)		$905.11	Transfer to SSA account to cover reimbursement of Lauren Goodley in May
12/5/2012	5234387	11/21/2012	UT Dolph Briscoe Center for American History		$1,000.00	$1,905.11	Sponsor of keynote speaker
12/28/2012	1001	12/28/2012	Kerrville Bus Lines	($375.50)		$1,529.61	Deposit

Deposit/Debit Date	Check No.	Check Date	Description	Debit	Credit	Total	Notes [Gray rows are for example only, delete before starting your accounts]

Deposit/Debit Date	Check No.	Check Date	Description	Debit	Credit	Total	Notes [Gray rows are for example only, delete before starting your accounts]
			Return seed money to SSA	($1,000.00)			
			TOTAL:	($1,470.39)	$2,000.00	$529.61	

Transferred from Paypal	Registration date	Description	Credit	Paypal fee	Total	Number	Notes [Gray rows are for example only, delete before starting your accounts]
20130322	2/14/2013	Registrations (Paypal)	$140.00	$3.38	$136.62	1	
20130322	2/14/2013	Reception Guest (Paypal)	$20.00	$0.44	$19.56		
20130322	2/15/2013	Registrations (Paypal)	$140.00	$3.38	$136.62	1	
20130322	2/15/2013	Workshops (Paypal)	$100.00	$2.20	$97.80		
20130322	2/19/2013	Registrations (Paypal)	$420.00	$10.14	$409.86	3	
20130322	2/20/2013	Registrations (Paypal)	$305.00	$7.31	$297.69	2	
20130322	2/20/2013	Reception Guest (Paypal)	$20.00	$0.44	$19.56		
n/a	2/20/2013	Registrations (check)	$140.00		$140.00	1	paid (Torrefraca)
		TOTALS:	$1,285.00	$27.29	$1,257.71	8	

First	Name	Date comped	Reason

SAMPLE budget -- work with your PDC chair to find the best way to handle the budget for your LAC

Description	Credit	Debit	Total	Notes
A/V: Cart ($15/room/day)			$0.00	Hotel will give us these for free
A/V: Microphone ($20 for 1 per room, per day)			$0.00	MM decided against mics for the workshops
A/V: Screen?		($25.00)	-$25.00	Needed for one room only
A/V: Whiteboard and markers		($20.00)	-$45.00	
Breaks - Food & drink (max 88)		($568.00)	-$613.00	priced at option 2 ($5/person in the am; $7/person in the pm); amount locked in before OH was cancelled
Breaks - Holiday Inn Service fee		($113.60)	-$726.60	20% service fee
Honorarium (Lauren Kata)			-$726.60	No honorarium - workshop cancelled
Honorarium (Mike Strom)		($250.00)	-$976.60	
Paypal transaction fees		($33.00)	-$1,009.60	2.2% of total ($0.30 per transaction fee under general budget)
Registrations - MPLP (Paypal)	$700.00		-$309.60	$50, Max 20 / Min 5, 1-5 (Roeser - did not pay, NO SHOW)
Registrations - Oral history (Paypal)	$800.00		$490.40	$100, Max 30 / Min 5, 9-3:30; Coffee/Tea and maybe some cookies at break time would be ideal
Registrations - Oral history (Check)	$400.00		$890.40	
Refunds - Full		($600.00)	$290.40	6 full refunds
Refunds - Partial		($300.00)	-$9.60	6 partial refunds (attended MPLP)

Paypal fees: $1.10 on $50; $2.20 on $100
Max People (including SAA): 88

MPLP registrations:	20	1 unpaid / no show	6 people transferred from OH to MPLP on Wednesday morning
Oral history registrations:	0	0 unpaid	Workshop cancelled
SAA registrations (as of 5/8)	24		
Total:	47		

	THURSDAY	FRIDAY	SATURDAY
	Plenary Session: 8:30-9:30	**SSA Past/Present/Future: 8:30-9:30 Diversity Training**	**Breakfast & Business Mtg: 8:00-10:00 SLOTTO: 9:00-10:00**
Break	Catered break 9:30-10:00	Catered break 9:30-10:00	short break: not catered
	Session 1: 10:00-11:30	**Session 3: 10:00-11:30**	**Session 6: 10:15-11:45**
Room 1			
Room 2			
Room 3			
Lunch			
	Session 2: 1:30-3:00	**Session 4: 1:30-3:00**	
Room 1			
Room 2			
Room 3			
Break			
	Tours 3:30-7:30	**Session 5: 3:30-5:00**	
Room 1			
Room 2			

Room 3			
		Reception	

January 24, 2017

[NAME]
[INSTITUTION]
[ADDRESS]

Dear [NAME]:

The Society of Southwest Archivists (SSA) will be holding its annual meeting in Oklahoma City from Wednesday, May 18 through Saturday, May 21, 2016. Our city is in the midst a cultural renaissance and we are more excited than ever to welcome the annual meeting for Southwest archivists to OKC!

We anticipate that this year's meeting will bring 175 - 200 archivists and individuals working in allied disciplines. Held in revitalized downtown Oklahoma City, the conference theme "Native Routes" will bring sponsors, exhibitors, and attendees together to attend what promises to be exciting conference sessions and events.

I would like to invite you to sponsor the 2016 meeting in Oklahoma City. As a valued [ORGANIZATION/COMPANY/REPOSITORY] within the archival and records profession, sponsorship will bring you increased name recognition and help you build relationships with archivists and records professionals interested in your [SERVICES AND/OR PRODUCTS]. Please find attached further information concerning sponsorship opportunities, and the benefits associated with the various sponsorship levels. **Please note that dates for exhibiting are Thurs and Fri, May 19-20, 8a-5p.** As a participant at the conference, you are entitled to receive the discounted room rate of $139/single or double room.

We hope that you will consider supporting this meeting through a contribution that will help the Society of Southwest Archivists make this meeting the best ever. We look forward to working with you to meet your goals for promoting [ORGANIZATION/COMPANY/PRODUCT] at the 2016 Society of Southwest Archivists annual conference.

With best regards,

SSA Local Arrangements
Sponsorships Subcommittee
[YOUR NAME], Member

January 24, 2017

[NAME]
[INSTITUTION]
[ADDRESS]

Dear [NAME]:

I would like to extend my sincere appreciation for your participation at the 2016 Society of Southwest Archivists annual meeting in Oklahoma City. I hope that you had a chance to interact with many of the 200 registrants, and that those contacts will result in beneficial working relationships in the near future. I heard many positive comments about the exhibitors from our members at the meeting, so I know that the attendees were certainly impressed with you!

Please keep the Society of Southwest Archivists in mind when scheduling next year's exhibitions. Their next annual meeting will be held in CITY, in May 2017.

With best regards,

Sponsorships Subcommittee Chair
Local Arrangements Committee
2016 SSA Annual Meeting, Oklahoma City

Society of Southwest Archivists Annual Meeting 2016
May 18-21, 2016
Cox Convention Center, 1 Myriad Gardens, Oklahoma City, OK 73102

Registration Procedures for Advertisers, Exhibitors and Sponsors

- Complete form, including payment section.
- Email completed form to Nathan Gerth at ngerth@ou.edu
- Or mail form to address at right.
- If you do not receive confirmation e-mail within one week, contact Nathan

Send to:
Nathan Gerth
The University of Oklahoma
630 Parrington Oval, Rm 101
Norman, OK 73072
Phone: 405-325-6419
Email: ngerth@ou.edu

Designated Contact Information *(for planning and logistics***)**   *Please TYPE or PRINT clearly.*

Company Name:	
Contact Person:	
Address:	
City, State, Zip:	
Phone:	
Email Address:	
Web Address:	

Select your sponsorship level:

	Participation	Amount
	Exhibitor: Exhibit space includes one 6-foot table, floor length drape, 2 chairs, trash basket, access to electricity, wireless access, conference program ad (1/3 page) and listing on the conference website. For more details see General Exhibit Information on page 2.	$350
	Silver sponsorship: Sponsorship of a coffee break receives one paid registration, recognition from the podium and on posters, website, and a program ad (half-page) and exhibit booth (see General Exhibit Information on page 2).	$1000
	Gold sponsorship: Sponsorship of audiovisual support at all sessions, or of bus transportation to Friday repository tours, includes two paid registrations, recognition from the podium, on posters, website, and program ad (full page) and exhibit booth (see General Exhibit Information on page 2).	$2000
	Diamond sponsorship: Sponsorship for hosting the business meeting or nighttime reception. Sponsors receive two paid registrations, tickets for all events for two attendees, recognition from the podium, on posters, website, and program ad (full page) and exhibit booth. Sponsors are invited to place advertising in strategic areas such as reception table tops (see General Exhibit Information on page 2).	$4000
	Advertiser: Individuals who wish to purchase advertising space, but not exhibit or sponsor, can purchase a program ad at the 1/3 page size.	$150

General Exhibit Information

Society of Southwest Archivists Annual Meeting 2016
May 18-21, 2016
Cox Convention Center, 1 Myriad Gardens, Oklahoma City, OK 73102

Days and times of exhibiting: Thurs, May 19 and Fri, May 20, 8a-5p

Each exhibit is limited to ONE company name for conference listings (links, posters, advertisements).

The Cox Convention Center offers exhibit space in the hallway outside the main session rooms. The space cannot be locked; however, material can be moved into meeting rooms for locked storage overnight. The best security for laptops and other items is your room. Free wireless hotspots are provided near the meeting area.

Focus on the services and products you have to offer and keep exhibit space relatively simple. Artificial back walls, area rugs, pipe-and-drape services, and special furniture are not available for this event. NOTHING may be affixed to the walls in the exhibit space.

Each exhibit space will include a **6-foot table** with a floor-length tablecloth, 2 chairs, and trash basket. Access to electricity is available, although you may need to bring an extension cord. The **approximate** floor space of a single area is **8' wide by 8' deep**. Exhibit locations are assigned by conference staff.

Please attach your logo or advertising copy for use on the conference website and program. JPEG format is preferred for logos.

- Full page ad size is approximately 4.5" x 8"
- Half page ad size is approximately 4.5" x 3.87"
- 1/3 page ad is approximately 4.5" x 2.62"

Commitment

Total Sponsorship amount: $_____
(Make checks payable to *Society of Southwest Archivists*)

Important – Confirmed sponsors should all receive regular email communications from Ann Case

Comments?_____

Agreement of Terms and Conditions

Cancellations or any change that affects the cost must be submitted in writing. **The sponsor is still liable for all exhibit fees if registration is cancelled after April 15, 2016.**

Signature verifying all information is correct and agreeing to terms stated: _____

Society of Southwest Archivists

Travel Expense Reimbursement

Name			
E-mail		Address	
Phone			

Expenses	Dates	Details				Amount
Transportation		☐Air	☐Taxi	☐Rental car	☐Other	
		☐Air	☐Taxi	☐Rental car	☐Other	
		☐Air	☐Taxi	☐Rental car	☐Other	
		☐Air	☐Taxi	☐Rental car	☐Other	
Own car		Mileage (.54/mile):				
Lodging		Location:				
		Location:				
Meals		Location:				
		Location:				
		Location:				
Parking		Location:				
		Location:				
Other		Purpose:				
		Purpose:				
					Subtotal	
					Less amount paid	
					Total amount due to claimant	
Signature				Date		

Please attach receipts for all listed expenses, sign the form and send to:
SSA LAC Treasurer

Society of Southwest Archivists

Annual Meeting Evaluation Form

Please circle a number to indicate your response:

1 = Poor   **5 = average**   **7 = above average**   **10 = excellent**

1. Overall quality of the meeting this year

1   2   3   4   5   6   7   8   9   10

What would improve the quality of future meetings? _____

_____

2. Quality of the sessions offered

1   2   3   4   5   6   7   8   9   10

Were there topics you wish had been covered? _____

_____

3. Sufficient opportunities to network / socialize with fellow SSA members

1   2   3   4   5   6   7   8   9   10

What do you consider the best networking/socializing aspect of the conference? _____

_____

4. Quality of the repository tours

1   2   3   4   5   6   7   8   9   10   n/a

Comments: _____

5. Quality of the pre-conference workshops

1   2   3   4   5   6   7   8   9   10   n/a

Were there topics you wish had been covered?_____

_____

6. Quality of access to & time with the vendors / exhibitors

1   2   3   4   5   6   7   8   9   10

7. Additional comments about or suggestions for this and/or future annual meetings:

8. General comments or suggestions for SSA:

Thank you!