

·  
·  
·

# Local Arrangements Committee

Southern Association of Collegiate Registrars and Admissions Officers



This manual is the operational guide for the Local Arrangements Committee of the Southern Association of Collegiate Registrars and Admissions Officers (SACRAO), and includes brief descriptions of responsibilities and suggested calendars of activities to fulfill these responsibilities.

The manual is revised annually as needed, and revised text is disseminated to successive LAC members. The LAC and members of SACRAO may make suggestions for revisions to the current LAC chair, who serves as editor of the manual. Copies of the manual are distributed to new LAC members at the annual meeting.

The manual was first developed in 1980.

***Revised May 2014***

# Contents

---

<b>Introduction .....</b>	<b>3</b>
Foreword.....	3
<b>Preparing a SACRAO Bid .....</b>	<b>4</b>
General Guidelines .....	4
Historical Information .....	6
<b>Local Arrangements Committee .....</b>	<b>9</b>
Function .....	9
Responsibilities .....	9
Organizing the LAC .....	9
General Guidelines for LAC Members.....	9
<b>Local Arrangements Chair .....</b>	<b>10</b>
Function .....	10
Responsibilities .....	10
LAC Chair Calendar.....	12
<b>Corporate Partners.....</b>	<b>14</b>
<b>Finance.....</b>	<b>15</b>
<b>Hotel and Hospitality.....</b>	<b>18</b>
<b>Social &amp; Catered Events .....</b>	<b>Error! Bookmark not defined.</b>
<b>Physical Arrangements.....</b>	<b>22</b>
<b>Publicity &amp; Publications .....</b>	<b>24</b>
<b>Registration.....</b>	<b>26</b>
<b>Transportation &amp; Outings.....</b>	<b>28</b>
Fun Run & Golf Event .....	28
<b>Appendix A: Finance Committee Forms .....</b>	<b>29</b>

# Introduction

---

This Local Arrangements Committee Manual is a working document, and a dynamic one. Sections are arranged by area of responsibility.

Users each year are encouraged to revise, delete, and otherwise improve the contents based on their experiences. Future Local Arrangements Committees are also invited to add their experiences and suggestions to the various sections. New samples of forms and correspondence may also be added to the appropriate sections.

---

## Foreword

A successful annual meeting happens because of hard work by many good people. Each member of the Local Arrangements Planning Manual Committee has chaired a SACRAO Local Arrangements Committee and learned that success comes from a blend of planning, luck, and the hard work of colleagues. This manual focuses on the planning phase because experience has shown that luck is less the dictator when good planning has taken place and good people are aided by sound planning.

The first Local Arrangements Planning Manual was developed in 1980. Subsequent Local Arrangements Committees have utilized the framework of the original document while adding new processes and updating responsibilities as time and changes necessitated.

Special thanks go to all who have contributed to the Planning Manual over the years, and to all Local Arrangements Committee members who have been instrumental in the success of SACRAO's annual meetings.

Finally, we extend our appreciation to the American Association of Collegiate Registrars and Admissions Officers (AACRAO); to the National Association of College Admissions Counselors (NACAC); the National Association for Foreign Student Affairs (NAFSA); and the Kentucky Association of Collegiate Registrars and Admissions Officers (KACRAO); for providing copies of their local arrangements planning documents.

# Preparing a SACRAO Bid

---

## *General Guidelines*

In February 1994, the SACRAO Executive Committee approved a three-region rotation plan. The regions are Eastern (FL, GA, NC/SC, VA, PR), Central (AL, KY, MS, TN), and Western (AR, LA, OK, TX). The site projection for the next several years is as follows:

- Eastern 2008, 2011, 2014, 2017
- Central 2009, 2012, 2015, 2018
- Western 2010, 2013, 2016, 2019

The Site Selection Committee is chaired by the Immediate Past President. The following comments may be useful as proposed annual meeting locations are being considered.

Proposals to host a SACRAO Annual Meeting should include the support of the host state or regional organization (such as CACRAO or FACRAO), the proposed location, usual weather conditions for February, and the names of nearby SACRAO member institutions that have agreed to help with local arrangements.

Proposals should in particular highlight special features or attractions of the area or annual meeting facility.

## *Considerations*

### *Travel*

The host city should be easily accessible by air, either directly or via connections from a southern hub (e.g., Atlanta, Charlotte, Cincinnati, Dallas, Houston, or Memphis). The availability of alternate means of transport (train, bus, interstate highway, etc.) is a plus.

### *Lodging*

The annual meeting hotel should have sufficient lodging and meeting rooms in a single or adjoining facility. Complimentary suites for the President, President-Elect, and LAC hospitality functions and a complimentary room for the AACRAO representative should be provided. The hotel should also provide a number of complimentary or reduced-price rooms for the summer planning meeting.

Overflow accommodations should be secured as necessary within easy walking distance of the primary meeting hotel/meeting facility.

### *Costs*

Hotels will not usually commit to fixed rates more than a year before the annual meeting. Rates provided at the time of the bid should contain an escalation cost indicating what rates will be offered for the annual meeting. Final room rates and costs for food functions, meeting rooms, audio visual equipment, etc. should be provided in writing by the hotel no later than one year prior to the meeting. Special room rates (e.g. king, leisure, suites) should be noted.

It is desired that the hotel extend the annual meeting accommodations rate to attendees three days prior to and three days following the meeting. Usually, complimentary rooms are provided at the rate of one room night for every 40-50 room nights booked by the annual meeting attendees. The rate should be stated in the contract. Complimentary parking and in-room internet connections should be negotiated for guests when feasible.

### *Audio Visual*

SACRAO has regularly secured the services of a private firm to manage the majority of the session needs (refer to the Physical Arrangements section for specifics). Make certain this firm is allowed to provide services in the meeting facility and ascertain if any charges are involved.

### *LAC Chair*

This person must be able to serve for two years, be located in or near the host city, and have given evidence of exceptional organizational skills through participation at state or regional levels. Essential talents are the ability to identify good workers and to delegate responsibility. A good LAC Chair does not do it alone.

### *Competition*

Although it has not happened in recent years, one of the goals of the "bid" process is for the EC to have more than one state (or more than one city within a state or more than one hotel within a city) bidding to host the meeting. Such a competitive process could result in more favorable negotiations.

**Bids must guarantee the following minimum requirements:**

***Summer Planning Meeting***

- Complimentary or discounted accommodations for the Summer Planning Meeting, held usually in early- to mid-June. This meeting generally requires single-occupancy lodging rooms for 24-25 persons for the first two nights, 15 persons for the third night, and possibly two persons (not always the same gender) for the fourth night.
- Meeting room space and a hospitality suite should be included. SACRAO does not encourage attendance by nor provide complimentary meals or lodging for spouses/guests.
- Care should be taken to select dates that do not coincide with any state association meetings.

***Hotel Facilities***

- Hotel name, address, phone, and contact person.
- Number of available bedrooms, with a reserved block of about three-hundred fifty (350) lodging rooms, with potential overflow nearby.
- Proposed costs for single rooms, double rooms, and suites which are within the approved government rates for the host state.
- Hotel registration system (web or toll-free access) for inclusion with conference registration information. Include policy for room release date and payment policy for holding room.
- Complimentary suites for the President, President-Elect, and LAC Chair, and other complimentary VIP rooms as agreed by hotel/local arrangements and written into contract.
- Complimentary rooms policy or proposal. (Complimentary rooms are usually granted upon reservation of certain numbers of lodging rooms.)
- Internet address or toll-free number for reservations, available beginning in early November. Include cancellation deadline and any pre-payment requirements.
- Overflow hotel space availability, procedure, and rates.
- Friday night move-in for LAC, including LAC Chair suite, LAC room, Presidential Suite, and President-Elect Suite.
- President and President-Elect suites available through Noon on Thursday.
- An appropriately sized hospitality area should be available. Depending on the facility, it can work best to use a room that is not also being used as a

sleeping suite, such as a meeting room that is otherwise not needed.

- Alcohol and food from outside should be allowed in the hospitality room. If the hotel can provide catering for hospitality, doing so may decrease the liability risk if the hotel is supplying the alcohol, but it usually increases the cost.
- Parking and in-room Internet arrangements and costs.

***Meeting Facilities***

- Area for registration in a conspicuous location, with outlets for electrical hookups and internet access.
- Convenient and secure room for Physical Arrangements Committee meetings and storage (registration equipment, possibly A/V equipment).
- Rooms for use by Evaluations and LAC Committees (LAC Fri – Weds).
- Sunday space for 2-3 concurrent workshops, registration area, Program Chairs/VPs meeting, First-Time Attendee Orientation/Reception, evening full reception, and an opening session (after workshops, before reception).
- Available meeting rooms by size (150-200, 100-149, 50-99, 30-49, under 30).
- Breakout rooms (at least 10-12) at each time slot during the day on Monday, Tuesday, and Wednesday morning with a minimum of 5 rooms with capacity of at least 75-100. Ability to convert 3-5 rooms to workshop style.
- An assembly room (theater style) for 700 for opening session, Business Meeting (Tuesday 10 A.M.), and Wednesday Invitation Breakfast.
- Ballroom dining for 600 at tables of 6-10 each.
- Exhibit hall for 35-50+ exhibitor booths (approx. 10'x10' each). This space should not conflict with other meetings, and must include space for hospitality service areas. After-hours security must be available, and all standard charges must be specified in the contract, along with what is included in the cost (set-up, tables, chairs, electricity, etc.).
- Charge for meeting rooms (SACRAO will generally not expect to pay for meeting rooms)
- Saturday afternoon Executive Committee meeting, plus hospitality suite.
- Space in hotel or nearby for special lunches for Monday and Tuesday at Noon (State Association Presidents and Past-Presidents, LAC Committees).
- Tuesday Noon space for program committee meeting/luncheon.

- Wednesday afternoon and Thursday morning meeting room for Executive Committee.

#### ***Additional Considerations***

- Preference will be given to hotels/facilities with comprehensive services and of such size that SACRAO will be the dominant activity.
- The annual meeting rates should be available a few days in advance and after the meeting for attendees arriving early or departing late.
- The ability to bring in A/V equipment, or the names of approved providers and rates.
- Space and policy for holding corporate partner

equipment until setup.

- Availability and cost of duplicating facilities.
- Ability to use a master account to bill charges to the LAC.
- Support from local convention and visitors bureau or chamber of commerce to assist with promotional materials.
- Distance from airport to annual meeting facility.
- Availability and cost of transportation between hotel and airport (include names of companies).

---

## **Historical Information**

### ***Location and Attendance***

<b>Year</b>	<b>Location</b>	<b>Facility</b>	<b>Regular</b>	<b>Corporate</b>	<b>One Day/ Guest/ Other</b>	<b>Total</b>
1989	Tulsa, OK	Kensington and Grandview				510
1990	Charleston, SC	Omni Charleston				673
1991	Lexington, KY	Hyatt Regency Lexington				625
1992	Birmingham, AL	Wynfrey Hotel				601
1993	Fort Worth, TX	Forth Worth Radisson Plaza				677
1994	Norfolk, VA	Norfolk Marriott Waterside				663
1995	Jackson, MS	Holiday Inn – Downtown				670
1996	Ponte Vedre Beach, FL	Sawgrass Golf Resort & Spa				563
1997	Louisville, KY	Galt House Hotel & Suites				702
1998	Corpus Christi, TX	Omni Corpus Christi Hotel				556
1999	Savannah, SC	Hyatt Regency Savannah				669
2000	Memphis, TN	Peabody Memphis				635
2001	Oklahoma City, OK	Westin Oklahoma City				565
2002	Birmingham, AL	Sheraton Birmingham Hotel				608
2003	Biloxi, MS	Beau Rivage Resort & Casino				651
2004	Fort Worth, TX	Forth Worth Radisson Plaza				592
2005	Myrtle Beach, NC	Radisson Plaza Myrtle Beach				700 (est)
2006	Lexington, KY	Hyatt Regency Lexington				647
2007	Little Rock, AR	Peabody Little Rock				

2008	Williamsburg, VA	Williamsburg Lodge	492	86	34	612
2009	New Orleans, LA	Astor Crowne Plaze				504
2010	Chattanooga, TN	Marriott	436	61		497
2011	Atlanta, GA	Sheraton Downtown	502	72	21	595
2012	Covington, KY	Marriott/Embassy Suites	381	96	18	495
2013	San Antonio, TX					
2014	Raleigh, NC	Marriott City Center & Sheraton Raleigh	513	92	Day: 56 Guest: 14	675

### ***Hotel Room Pick-Up***

Year	Thursday	Friday	Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday
1989		10	204	296	304	272	29	11
1990		8	150	300	300	300		
1991	1	11	168	293	291	250	23	
1992			151	285	298	268	22	
1993		16	219	344	343	307		
1994	2	17	208	295	296	266	26	2
1995	1	12	226	312	313	312	31	2
1996			119	302	315	268	34	2
1997		22	267	454	451	408	55	
1998		36	250	364	360	337	45	
1999	1		196	370	373	375		
2000		19	226	392	395	365	35	
2001		25	155	271	268	259	22	
2002		9	130	331	335	269	19	
2003	1	29	202	396	407	357	31	2
2004		40	209	355	355	318	33	
2005		25	100	350	350	250	25	
2006		21	169	307	306	265	22	
2007^		25	200	350	350	225	25	
2008	4+2 Weds	69	252	443	441	408	49	3+1 Fri
2009		33	144	287	284	261	29	
2010*		18	65	274	292	252	21	2
2011#		21	141	371	382	315	23	
2012		17	128	344	352	296	21	

SACRAO

<b>Year</b>	<b>Thursday</b>	<b>Friday</b>	<b>Saturday</b>	<b>Sunday</b>	<b>Monday</b>	<b>Tuesday</b>	<b>Wednesday</b>	<b>Thursday</b>
2013~		25	190	335	335	280	25	
2014		13	124	361	361	344	38	
2015~								
2016~								
2017+								

^ room block is provided as room pickup was not available

\*plus 33 nights in other hotels for a total of 957 (weather contributed to low attendance)

#includes 230 nights in other hotels (1-Fri., 27-Sat., 68-Sun., 68-Mon., 64-Tues., 2-Wed.)

~contracted block

+recommended block



# Local Arrangements Committee

---

## Function

The Local Arrangements Committee (LAC) is responsible to the President through the President-Elect. Organizationally, the LAC Chair is appointed by the President and serves as an ex-officio member of the Executive Committee. Functionally, the LAC works through the President-Elect, who has overall responsibility for the annual meeting. Facilities, financing, special events and activities, equipment, promotion, corporate partners, transportation, and registration of participants are matters falling under the LAC.

## Responsibilities

- Ensures adequate meeting space for program sessions and exhibits.
- Recommends a budget and an annual meeting registration fee to the Executive Committee.
- Expends funds within the level of expected income.
- Determines the nature, extent and cost of official social activities.
- Makes arrangements for special equipment (audio visual equipment) for program presenters.
- Secures participation of corporate partners with products and/or services related to the professional duties of association members.
- Promotes the annual meeting among the membership and to other interested individuals.
- Provides for the registration of participants.
- Ensures adequate air and ground transportation is available for the participants attending the annual meeting.
- Keeps adequate records of activities and submits a final report including financial accounting within 3 months following the event.
- Secures all necessary licenses and permits required by the meeting activities.

## Organizing the LAC

While each LAC is unique in its organization, this manual provides responsibilities for eight different functions. Some LACs may elect to combine these functions while others may further divide the

functions to more than eight. Each LAC should organize itself in a manner to ensure the resources (committee chairs and committee members for each function) are available to meet the responsibilities.

The committees are delegated primary responsibilities for the activities in their areas as described in subsequent chapters. The committee chairs and the LAC Chair constitute the Local Arrangements Committee. Committee members for each of the functional areas will meet with their chair, but not usually with the LAC.

## General Guidelines for LAC Members

- Annual meeting expenses should not exceed the anticipated revenues generated by the registration fee. A formal budget should be prepared based on prior years' meetings.
- Liaison with the Program Committee and the Executive Committee is normally via the Chair.
- Choose committee members for all committees who will perform their assigned responsibilities promptly and well, and who have the support staff needed to carry out their responsibilities.
- Committee members should be as representative of the general membership as possible.
- Certain committee positions may require the individuals to be in the immediate area of the annual meeting hotel; e.g. Hotel and Hospitality Chair.
- Time frames are important and tasks should be completed when indicated.
- Copies of all committee correspondence should be maintained for the LAC.
- Requests for funds must be made as far in advance as possible to the LAC Chair. Determine if suppliers will bill rather than require cash payment.
- Receipts must be provided with reimbursement or payment requests.
- Do not commit the Association to pay for any expenses not approved by the LAC Chair.

# Local Arrangements Chair

---

## Function

To be responsible for all local activities related to the annual meeting except for the program itself.

## Responsibilities

- A. Appoints all LAC committee chairs and members.
  - Solicits volunteers from the host state association through the state association's annual meeting and membership list, and the SACRAO Newsletter.
  - Selects from those who volunteer and attempts to match skills with the stated preference.
  - Informs committee chairs of the time and travel commitments expected of them.
- B. Attends Summer Planning Meeting for the Annual Meeting prior to the meeting for which the Chair is responsible.
  - Attends Program Committee and Executive Committee Meetings as appropriate.
  - Works with preceding LAC Chair to gain an understanding of the Chair's responsibilities for this meeting.
- C. Develops, with the assistance of the President and President-Elect, the Summer Planning Meeting budget.
- D. Develops, with the assistance of the Finance Chair, the Annual Meeting Local Arrangements Budget.
  - Develops preliminary budget for presentation to the Executive Committee the prior annual conference.
  - Develops the final budget for presentation at the June Summer Planning and Executive Committee Meeting. **Note:** Budget development is discussed in detail in the Finance Section of this manual.
- E. Hosts the Summer Program Planning and Executive Committee Meeting. **Note:** May be assisted by the Hotel and Hospitality Chair.
  - Utilizes complimentary rooms provided by the hotel to house the Program and Executive Committee members for the Summer Planning Meeting. The Program Committee usually meets from Sunday morning to Monday Noon and the Executive Committee meets from Monday Noon until Tuesday Noon.
- F. Monitors progress of all LAC Committees.
  - Requests single-occupancy rooms to house the Program Committee (for two nights) and Executive Committee (for three nights).
  - Attempts to provide a complimentary suite for the President and a suite for the LAC Chair (if the Chair plans to provide hospitality during the planning meeting).
  - Assign individuals to rooms. Attempts to place Program Chairs together and Executive Committee members together due to the different number of nights each group stays.
  - Coordinates travel arrangements.
    - Provides instructions on locating the annual meeting hotel.
    - Obtains expected arrival times for those attending. Arranges travel from the airport to the hotel when feasible.
  - Plans evening meals, entertainment, and hospitality.
    - Provides meals for Saturday and Sunday, and for the Executive Committee on Monday.
    - Attempts to provide evening meals/entertainment at several different locations in the host city near the meeting site to showcase the locale.
    - Provides evening hospitality if suite provided for LAC Chair and time permits.
  - Arranges working lunches for the Program Committee on Sunday and the Executive Committee on Monday.
  - Provides information on convenient locations for breakfast and lunch (for those not involved in meetings).
  - Arranges billing and payment with the SACRAO Treasurer. SACRAO, not the LAC, pays all expenses for the Summer Planning and Executive Committee Meetings. There is a set amount budgeted for the summer meeting.

- update to the LAC Chair as needed.
  - Requests Committee Chairs to provide copies of minutes of their meetings.
  - Schedules LAC Meetings as needed:
    - to resolve issues and details,
    - to update the entire LAC on each committee's progress,
    - to assign additional duties or responsibilities to appropriate LAC Committees, and
    - to ensure each committee is on task and is meeting the LAC timelines.
- G. Works with President, President-Elect and Hotel Chair to assign complimentary rooms and provide list of required reservations to hotel two months in advance of the conference.
- H. Serves as the liaison with the SACRAO Program Committee and the Executive Committee.
- Coordinates all program needs through the President-Elect, to include:
    - audio visual requests,
    - physical arrangements for sessions,
    - meeting room assignments, and
    - selection of the keynote speaker.
  - Coordinates all other Annual Meeting activities with the President or appropriate Executive Committee member.
    - Coordinates special breakfasts and lunches with the President.
    - Coordinates workshop breaks, lunches, etc. with the President-Elect.
    - Coordinates website updates with VP of IT
    - Requests President to identify those individuals who will be provided a complimentary room.
  - Considers the Chair of the following year's LAC as an ex-officio member of the current LAC.
    - Provides copies of minutes to the next LAC Chair.
    - Encourages the next LAC Chair to attend current LAC meetings, if possible, especially any meeting held during the Annual Meeting.
    - Encourages current LAC Committee Chairs to make contact with their colleagues who will handle the same function for the coming year's LAC. Invites them to assist or "shadow" them during the Annual Meeting.
    - Hosts a briefing session where current LAC Committee Chairs meet and discuss items with next year's LAC.
- I. Coordinates all necessary follow-up activities.
- Determines which LAC Committee Chairs will write thank you letters to which groups and individuals. The following should be thanked:
    - all members of the various LAC Committees,
    - college staff who assisted with the annual meeting,
    - hotel personnel,
    - vendors and sponsors, and
    - welcome speakers.
  - Coordinates with the SACRAO President those who deserve special recognition and thank-you letters from the President.
  - Requests LAC Committees to provide bills for payment as soon as possible after the conclusion of the Meeting. Sets a date by which all bills must be received for payment (usually no later than 30 days).
- J. Submits a final report for the Executive Committee within 3 months of the annual meeting.
- The report should include a summary of:
    - number of total registrations, guests, and vendors,
    - number attending from each state,
    - number of paid "no shows", and
    - other information which might be valuable for future LACs.
  - Working with the Finance Chair, provides a complete financial summary of the meeting, including:
    - total income by source,
    - total expenses by expense category, and
    - balance (profit or loss).
  - Summarizes any problems encountered during the LAC cycle.
  - Provides a list of recommendations for future LAC planning.
  - Provides a copy of the final report to the following year's LAC Chair, who will distribute it to his/her chairs.
  - Updates this Local Arrangements Committee Manual as appropriate.

This manual is designed to serve as a guide. The LAC Chair may wish to establish other procedures and policies for LAC members as necessary. Remember, the chief consideration is to ensure a smoothly-run annual meeting and to provide a worthwhile professional and social experience for the SACRAO membership.

---

## LAC Chair Calendar

(This represents high level tasks and deadlines. A more detailed calendar should be developed by the LAC Chair for each specific conference.)

### Two Years Prior to Annual Meeting

#### *February*

- Appointment by SACRAO President.
- Begin interviewing subcommittee chairs.
- Send dates to VP for IT for inclusion on the Events page of the SACRAO website
- If hotel and conference center contracts are not yet ratified, expedite this. Ideally, contracts should be in place two years out.
- Completely familiarize yourself with hotel and conference center policies and costs to ensure adequate and accurate planning during the next two years.

#### *June*

- Attend Summer Planning Meeting (expenses covered by SACRAO).
- Submit nominations for AACRAO leadership positions.

#### *July*

- Approve all Subcommittee appointments (20 months in advance) and assign duties as listed in most recent LAC manual.

#### *August*

- Submit nominations for AACRAO honorary membership and SACRAO recognitions and awards.

#### *September*

- Develop LAC logo and letterhead.

#### *November*

- Provide anticipated budget costs for the Summer Planning Meeting to the President and Finance Committee so that the Summer Planning and Executive Committee Travel lines will be accurate in the budget.

#### *December*

- Finalize the appointment of Committee Chairs.
- Plan publicity for February meeting. Secure volunteers to work publicity booth at Annual Meeting. Collect promotional materials and door prizes.
- Begin work on the Conference Website (with input from VP for IT).

### Year Prior to Annual Meeting

#### *January*

- Draft preliminary conference budget

#### *February*

- Receive briefing by current LAC Chair and closely observe subcommittees at work. Adjust preliminary conference budget accordingly. Ensure that committee chairs “shadow” their counterparts at the annual meeting.
- Attend appropriate meetings during the Annual Meeting.
- Promote next SACRAO conference at exhibit during Annual Meeting and make presentation at the Invitation Breakfast.
- Request advance from SACRAO (\$4000 to \$5000) to cover initial LAC expenses and work with LAC Finance Chair and SACRAO Treasurer to establish a bank account.

#### *March*

- Submit promotional information about Annual Meeting to the Newsletter Editor for the May issue (deadline generally March 10).
- Hold a Local Arrangements Committee Meeting in the spring, ideally to include a tour of the conference facility and hotel.
- Bring up Conference website shell. Details will follow, but initial information about the area and the hotel should be visible shortly after the previous annual meeting.

#### *April*

- If attending the AACRAO Annual Meeting, attend SACRAO Executive Committee meeting, if held.
- If budgeted, order complimentary promotional shirts for Executive Committee members so that shirts may be worn during various state meetings. Distribute shirts at Summer Planning Meeting.
- Submit nominations for the SACRAO Executive Committee and Nominations and Elections Committee.
- Submit nominations for SACRAO Honorary Membership and other recognition awards.

#### *May*

- Work with President and President-Elect to finalize plans and the budget for summer planning meeting.

#### *June*

- Host Summer Planning Meeting at SACRAO’s expense (see travel section). Attend Program and Executive Committee meetings and present

proposed LAC budget to Executive Committee.

- Enhance conference website (transportation information, tentative schedule, etc.).
- Assist President-Elect in checking Preliminary Conference Program section.
- Finalize preliminary conference budget.
- Submit article to Newsletter Editor for July e-Newsletter (deadline generally June 10).
- Submit nominations for AACRAO leadership positions.

### ***August***

- Begin working with hotel to ensure that the room reservation system will be ready to link to website in late October.
- Ensure that the registration chair, finance chair, and VP for IT begin work on the conference registration system and PayPal, for “go live” in late October.
- Ensure that the Corporate Partner chair prepares exhibitor information (including contract and details about sponsorship) for mailing in October.
- Submit nominations for AACRAO honorary membership.

### ***September***

- Submit article to Newsletter Editor for November issue (deadline generally September 10).

### ***October***

- Continue to fill out information on conference website—tours, activities, transportation, etc.
- Go-live with conference registration and hotel by the end of the month.
- Send e-blast to membership announcing the conference and opening registration and hotel reservation system by November 1, and send promotional materials to prospective Corporate Partners.
- Conduct another Local Arrangements Committee meeting in fall.

### ***November – December***

- Weekly monitoring of all aspects of local arrangements.
- Send postcard mailing (if budgeted) in December.

## **Year of Annual Meeting**

### ***January***

- Weekly teleconferences with president and president-elect and regular contact with committee chairs.
- E-blast just before the registration deadline.

### ***February***

- All LAC committees serve in designated roles during conference.
- Chairs meet with counterparts for the upcoming year.
- LAC Finance Chair meets with upcoming LAC Finance Chair to go over PayPal setup and reporting in conference web module.
- Attend Executive Committee meetings (Saturday and Wednesday/Thursday).

### ***March***

- Prepare and mail “Thank You” notes.
- Collect final payments and pay final bills.

### ***April***

- Present final report to President, President-Elect, Immediate Past President and Executive Committee.

### ***May***

- Close bank account.
- Update LAC Manual and distribute to next LAC Chair, the President, President-Elect, and Immediate Past President.

# Corporate Partners

---

## Function

To attract corporate partners to exhibit and present exhibitor track presentations at the Annual Meeting. Corporate partner participation provides the membership with information about recent industry developments while at the same time contributes to the financial success of the annual meeting.

## Responsibilities

- A. Recruits corporate partners, including the identification of new exhibitors.
  - Obtains updated list of corporate partners from previous LAC.
  - Utilizes exhibitors who attend AACRAO, state meetings, and other professional development meetings.
- B. Identifies, with the assistance of the LAC Chair and President-Elect, corporate partners to make session presentations.
  - Works with LAC Chair to obtain enough meeting rooms for an exhibitor track, which could add one or more program sessions during each time slot.
  - Provides exhibitor track session information to the President-Elect for inclusion in the Annual Meeting program.
- C. Establishes a corporate partner fee and an exhibitor track fee.
  - The corporate partner fee should cover the cost of exhibit space (one booth) and one registrant. Additional representatives sent by a single company will pay a rate equal to the regular meeting registration fee.
  - An exhibitor track fee shall be charged for each corporate presentation. A schedule of sponsorship opportunities at various levels shall be established. Sponsorship of individual events may be offered as deemed appropriate, but “ownership” of those events shall clearly remain with the LAC, and complimentary accommodations or registrations should not be given in exchange for sponsorship.
- D. Works with LAC Chair and LAC Finance Chair to forecast the estimated revenue from corporate partners. Also works with Physical Arrangements Chair to develop an estimate of related expenses.
- E. Determines each corporate partner’s needs, including space needed for exhibit, electrical needs, audio visual needs, and any other special needs, and coordinates with Physical Arrangements Chair.
  - Determines opening and closing times for exhibit area.
  - Coordinates breaks with Social and Catered Events Chair in vendor area.
  - Provides corporate partners with a conference attendee list for one-time use approximately two weeks prior to the conference.
  - Supervises the exhibit area during the annual meeting.
- F. Monitors corporate partners’ registrations. Works with LAC Finance Chair to process any Corporate Partner or exhibit payments made via check.
  - Creates a list of corporate members with names of representatives for inclusion in the registration packet or online conference guide (e.g. Guidebook).
- G. Serves as the LAC liaison with the corporate partners during the planning cycle.
- H. Authorizes refunds for corporate partners who cancel prior to the registration deadline.
- I. Submits final report and recommendations to the LAC Chair as requested.

# Finance

## Function

To establish procedures for receiving and dispersing funds and accounting for income and expenditures. Finance will provide income and expense estimates throughout the annual meeting planning period and will assist the LAC Chair with budget development and the preparation of the Final Report.

## Responsibilities

- A. Works with SACRAO Treasurer to establish a bank account for the Local Arrangements Committee. The SACRAO Treasurer will provide an advance with which to open the account and cover LAC expenses incurred before registration begins.
- Check cards may be useful, one for the Chair and one for the LAC Chair.
  - Opens the account in the name of the SACRAO [Year] LAC and authorizes both the Finance Chair and LAC Chair to sign checks.
  - Requests that the bank send monthly statements to the Finance Chair.
- B. Establishes a dedicated e-mail account (e.g., sacrao2008@gmail.com).
- The e-mail address will be used for registrants' communication with the LAC about payment issues.
- C. Establishes a PayPal account using the dedicated e-mail account.
- **Note:** PayPal has a monthly maximum withdrawal limit of \$500. This limit can be lifted by registering the account with a personal credit card, which should be done before the registration period begins.
  - The PayPal service fee is approximately 3.5%, which should be factored into the budget.
  - PayPal can be used to generate bills for registrants who did not pay on-line at the time of registration, to bill for workshops or other charges incurred after initial registration, or to generate bills to third parties paying on behalf of the registrants.
  - Withdrawals from PayPal should be made and reconciled regularly, including daily during peak periods.
- D. Utilizes an accounting system for all LAC finances which includes a general ledger and individual subsidiary accounts. (Quicken is an example of such a system.)
- Coordinates the accounting and report needs with the SACRAO Treasurer.
  - The SACRAO Treasurer should assist Finance Chair in implementing the accounting system.
  - Implements a general ledger (which is a record of all transactions in consecutive order and a fund balance).
  - Develops subsidiary accounts for all major revenue and expense areas. Specific accounts may vary by year, but possible accounts may include:
- INCOME**
- Corporate Partner Income
- *Additional Representative*
  - *Booth Fees*
  - *Exhibitor Track*
  - *Sponsorships*
- Miscellaneous
- *Fun Run*
  - *PayPal*
  - *Sponsorship*
  - *Tours*
- Registration
- *Guest*
  - *Late*
  - *One-Day*
  - *Regular*
  - *Workshop*
- SACRAO Income
- *Comp Rooms*
  - *Advance*
  - *Meals*
  - *Registrations*
- EXPENSE**
- Audio-Visual
- *Vendor*
  - *Internet Connections*
  - *Signage*
- Convention Space Rental
- Corporate Partner Expense
- *Breaks*

- *Gifts*
  - *Set-Up*
  - *Set-Up – Complimentary*
  - Entertainment
    - *Decorations*
    - *Door Prizes*
    - *Entertainers*
  - Food
    - *Big Event*
    - *Breaks*
    - *First-Time Attendees Reception*
    - *Invitation Breakfast*
    - *Joint LAC Lunch*
    - *Program Committee Lunch*
    - *Sunday Dinner*
    - *Workshop Breaks*
  - Honoraria
    - *Keynote Presenter*
    - *Workshop Presenters*
  - Hospitality
  - LAC
    - *Administration*
    - *Gifts*
    - *Hotel Rooms*
    - *Meals*
    - *Travel*
  - Miscellaneous Expense
    - *Fun Run*
    - *Tours*
    - *Workshops*
  - PayPal
  - Publicity
    - *At Previous Year's Meeting*
    - *Reminder Postcard*
  - Registration Packet
    - *Attendee List*
    - *Name Badge Ribbons*
    - *Name Badges*
    - *Pocket Program*
    - *Portfolios/Binders*
    - *Program Printing*
    - *Supplies*
  - SACRAO Expense
    - *AACRAO Comp Room*
    - *Evaluations Committee Printing*
    - *Meals – Executive Committee*
    - *Meals – Journal Board*
    - *Meals – President's Receptions*
    - *Meals – Professional Access and Equity*
    - *Meals – State Presidents*
    - *Registrations*
  - Transportation
    - Reconciles the subsidiary accounts to the general ledger at least once a month.
  - Reports of income and expenses may be needed for IRS purposes.
 

**Note:** Even though SACRAO is classified by the IRS as a tax-exempt organization, it is liable for payment of taxes on unrelated business income, e.g., fees collected from corporate partners allowing them to exhibit/advertise their products at the meeting. It is imperative that all expenditures related to advertising/corporate partner revenue—e.g. electrical hookups, phone lines, printing, exhibit drapes, etc.—be carefully documented. These expenditures can be deducted from the fees/revenue received, thereby reducing SACRAO's taxable income. Require an itemized accounting from the hotel/conference center/services provider.
  - Prepares monthly income statements for the LAC Chair.
- E. Develops an LAC budget with the assistance of the LAC Chair. The income from the meeting should cover all meeting expenses and allow for the return of the advance from SACRAO.
- Develops income and expense projections, using the account categories noted above.
    - Requests each of the LAC Sub-Chairs to estimate their expenses, which may include postage; printing; hotel and other rental fees; promotional, general, and other supplies; special events, tours, and entertainment; transportation; and other miscellaneous expenses.
  - Assists in the preparation of the preliminary budget for the LAC Chair to present to the Executive Committee.
  - Assists in the preparation of a final budget, presented by the LAC Chair to the Executive Committee at the Summer Planning Meeting.
- F. Develops deposit procedures.
- Obtains an endorsement stamps which reads: **SACRAO [Year] LAC For Deposit Only**
  - As payments are received, records individual attendees as paid in the SACRAO registration database.
  - Receives and deposits promptly all check payments, maintaining copies of all checks and deposit slips.
  - Regularly transfers money from PayPal and records PayPal service fees. **Note:** See Appendix B related to online payments, deposits, and records.



- Coordinates with Corporate Partners Chair the receipt and deposit of exhibit fees.
- G. Develops expense procedures, including an Expense Voucher/Refund Request form used to record all expenditures (see Appendix D).
- Determines if the LAC Chair will authorize all expenses (recommended for accountability).
  - Sets deadline for all bills to be rendered for payment after the close of the annual meeting (30 days recommended).
  - Any reimbursements made to the Finance Chair must be authorized by the LAC Chair.
- H. Serves as the LAC fiscal officer during the annual meeting.
- Creates billing forms and refund statements for use as requested by registrants (see Appendix D).
  - Is available throughout the annual meeting to provide checks to fulfill LAC financial obligations.
  - Assists at the registration desk to accept in-person payments and answer any questions related to payments.
- I. Develops a refund policy for registration fees, guest functions, tours, and other events for which fees are collected, and submits it to the LAC Chair for approval.
- Develops with LAC Chair an equitable refund policy and deadlines.
  - Establishes a cancellation fee. Particularly in light of the non-refundable PayPal fees, a cancellation fee on the order of \$10 is recommended.
  - Ensures refund policy and date(s) are published on all appropriate forms, e.g. registration form, website, and email receipt.
  - Determines, in conjunction with LAC Chair, the disposition of any late requests for refund. Late refunds may be authorized for extenuating circumstances or if the LAC has sufficient funds remaining following the meeting.
- J. Submits final report and recommendations to the LAC Chair. Provides a summary of all accounts to the LAC Chair with supporting documentation.
- K. Makes all books and documentation available for review by the SACRAO Auditing Committee at the following year's annual meeting.

# Hotel & Hospitality

## Function

To serve as the hotel contact for both the Summer Planning Meeting and the Annual Meeting and to coordinate all aspects of the Hospitality Suite during the annual meeting. A co-chair may be named for Hospitality. It is helpful for this chair to be located in the host city.

## Responsibilities

- A. Assists LAC Chair in coordination of the Summer Planning Meeting.
    - Arranges for sleeping accommodations, meeting rooms, and meal functions utilizing the hotel.
    - Establishes Master Account with hotel and delineates what limitations are placed on charges to the account.
    - Arranges for tour of the hotel facilities with SACRAO Executive Committee and Program Chairs.
  - B. Manages Hospitality Suite for Summer Planning Meeting.
    - Negotiates terms of hospitality suite—what can/cannot be brought into the hotel, size and location of suite, and corkage fees;
    - Orders items/services required from hotel, e.g., liquor, ice, etc., and reorders as needed or purchases items from outside source and delivers to the suite;
    - Determines liquor prices when hotel requires liquor purchased from them and negotiates refunds for return of unopened bottles;
    - Serves continental breakfast in suite
    - Arranges the hospitality suite;
    - Has available maps and information on local attractions, such as historical sites, museums and cultural events, shopping, and other tourist attractions;
    - May assist in the planning for meal functions and/or entertainment away from the hotel.
  - C. Serves as liaison between hotel and LAC for annual meeting.
    - Obtains in writing from the hotel the complimentary room policy and which suites will be available during the annual meeting. This should be negotiated in the original contract.
- Works with LAC Chair to assign all complimentary hotel rooms for the Annual Meeting and provide a list of required reservations to the hotel two months in advance of the conference. Comp rooms should be assigned in the following order of priority:
    - President (sleeping room and parlor); if appropriate, this space may be used for the President's evening receptions.
    - Local Arrangements Chair; the largest suite available if hospitality receptions will be held in this suite.
    - President-Elect (sleeping room); may share the same parlor with President if two sleeping rooms adjoin.
    - LAC Chairs; if overnight stays are needed and institutions are not able to cover hotel costs due to conference proximity.
    - Speakers, as identified by the President (sleeping room).
    - Distinguished guests (e.g., AACRAO Representative), as identified by the President (sleeping room).
  - If complimentary accommodations are not available, attempts to provide upgraded room accommodations for the following:
    - AACRAO representative(s),
    - special guests, and
    - SACRAO Executive Committee.
  - Meets with individual LAC chairs to identify specific hotel needs and/or meetings and arranges for those accommodations with the hotel.
  - Identifies those persons authorized to order and sign for services and meal functions and to order and sign for services and meals charged to the Master Account.
  - Negotiates terms of hospitality suite.

## Hospitality

- A. Coordinates all aspects of the hospitality suite.
- Negotiates for the largest suite available in terms of living space. A meeting room which is not needed for sessions could also be a suitable location. Typically the location of Hospitality is not in the same location as conference sessions as extra security may then be needed to monitor session A/V equipment during late hospitality suite hours. The location should include a wet bar, refrigerator, storage, and serving space; be convenient to a supply of ice, be complimentary and accessible to rest room(s); and be far enough away from guest rooms to minimize late night noise disturbances to hotel guests
  - Negotiates with hotel for liberal conditions concerning supplying snack foods and beverages in the suite.
    - It is usually considered most cost effective to be able to supply everything from outside the hotel. If, however, the hotel will sell refreshments at reasonable cost, it could be a better arrangement than bringing in alcohol. The additional cost for hotel bartenders in the suite would lessen the liability issue for the organization.
    - If buying from the hotel, make sure the charge is based on consumption. In addition to beverages and refreshments, consider getting quotes from the hotel for glassware, ice, daily trash removal and light cleaning of the suite.
    - Determines if other factors might affect suite utilization, such as local blue laws that may prohibit the sale of liquor by the drink and/or bottle.
- Sometimes a corporate partner will offer to sponsor the hospitality suite. If so, the LAC should retain responsibility of all arrangements, including bartending, in exchange for financial consideration.
  - Purchases supplies based on recommendations from previous Hospitality Committee(s). Make sure to keep a spreadsheet of expenditures and total daily beverage consumption to pass on to the next chair for forecasting.
  - In addition to alcoholic beverages and snacks, have water and soft drinks available.
  - Have available:
    - serving bowls and platters,
    - serving utensils,
    - bottle & wine openers,
    - bar knife and cutting board,
    - disposable plates, napkins, and beverage glasses
    - several large ice chests, and
    - large trash bags/cans.
- B. Determines liability for the Association and/or LAC personnel. The Association could be liable if someone attending an event in the hospitality suite or another function causes harm to him/herself or another person, or causes damage, as a result of alcohol consumption. A member of the Association should intervene if there is the appearance of excessive alcoholic consumption.
- C. Manages the Hospitality Suite during the advertised open days/times, typically 8pm – 11pm Saturday - Tuesday. Solicits volunteers from the membership to assist in staffing the suite.
- D. Ensures Suite is cleaned and trash is removed each night/morning

# Social and Catered Events

---

## Function

To provide a variety of social events and enrichment opportunities for the non-program meeting times throughout the annual meeting. This is a coordinating role that may be assumed by the LAC Chair or Co-Chair.

## Responsibilities

- A. Works with conference caterer to arrange for special meal functions):
  - New Member Orientation,
  - Journal Breakfast,
  - State Presidents Luncheon,
  - Past Presidents Luncheon (usually held off-site),
  - LAC Luncheon,
  - Program Committee Luncheon,
  - PAE Breakfast,
  - Invitation Breakfast, and
  - Additional Executive Committee lunches and breakfasts
- B. Ensures facility setup for catered events in coordination with Hotel Chair or Physical Arrangements Chair as appropriate.
- C. Coordinates the planned social events for the Annual Meeting and confirms setup prior to each event start
  - Plans food and beverage for events (normally included in registration fee), including:
    - opening night event,
    - Tuesday night Big Event, and
    - Invitation Breakfast (Wednesday morning).
  - Maintains a chronological calendar of functions, menu selections and facility setup requirements.
  - Coordinates with LAC Chair to sign tickets approving catering bills.
  - Arranges for event signage and decoration if needed. Coordinates signage with Physical Arrangements Chair.
  - Schedules volunteers as needed for events.
  - Arranges for special group functions or meals as needed. Only those meals marked with \* are LAC expenses; SACRAO pays for the others.
- New Member Orientation (VP for State & Regional Membership) 70-100 people
- Journal Breakfast (by invitation from the Journal Editor) 9-12 people
- Luncheon for State Presidents (by invitation from President; includes EC chairs and LAC Chair) 15-25 people
- Past Presidents' Luncheon (by invitation from Immediate Past President) off-site preferred, 8-10 people
- Program Committee Luncheon (by invitation from by President-Elect) 56 people set by committee, in rounds of 8
- LAC Committee Luncheon, for current and coming years' members (by invitation from LAC Chair) 20-25 people
- Professional Access & Equity Breakfast (by invitation from President) 10 people
- Receptions for Program Committees and Corporate Partners (by invitations from by President) 75-100 people each
- Schedules refreshment breaks.
  - Pre-Conference Workshops, if requested by President-Elect.
  - Breaks between sessions in exhibit area.
    - Hot and/or cold beverages appropriate to time of day.
    - Continuous service, if affordable.
    - Located to provide maximum exposure to corporate partners. Ideally, the refreshment area should be within the exhibit area.
    - May be underwritten or sponsored by a corporate partner.
- Keeps accurate counts for all social events.
  - The quantity and diversity of opportunities that exist for entertainment and activities nearby may lure attendees from events, and should be factored when providing meal counts.
  - If an event is billed by attendance, have a way to verify the numbers before signing ticket approving billing. The usual method is to collect tickets at door—and the tickets can also be used

- to draw for door prizes.
- Drink tickets should be tallied, unless the facility is running a cash bar. For pre-purchased bottled drinks, leftovers can be used in the hospitality suite.
- Consider the following factors with each activity:
  - type of function,
  - sale of alcoholic beverages or open bar,
  - theme and decorations,
  - time span of activity,
  - seating/head table,
  - ticket required for admission (recommended),
  - guest ticket price, if applicable,
  - cost (including tax and gratuities) relative to overall budget and registration fee, and
  - location and any required transportation.

---

## Catered Events

- A. Food & Beverage Guarantee guidelines:
  - a. First-Time Attendee Reception
    - i. No headtable
    - ii. Lavalier mic if at all
    - iii. Room should seat 100 in rounds
    - iv. Guarantee food (usually just brownies and lemonade) for 50% of first-timers registered for conference.
  - b. Opening Session
    - i. Head table: Pres, P-E, Secretary, LAC Chair, Speaker (if applicable), AACRAO rep
    - ii. AV: Screens for PP slide show of committee members, conference details, themes, speaker information, etc.

- Microphone and lectern on dais.
- iii. Guarantee food count at 60-70%.
- c. Town Meeting
  - i. No head table
  - ii. Microphone
  - iii. Seating for 50% of registrants
- d. Business Meeting
  - i. Head table for entire EC (set 16 chairs)
  - ii. AV: Screens for projecting items for vote, Microphone and lectern on dais
  - iii. Seating for 60% of registrants
- e. Tuesday Night “Big Event”
  - i. Guarantee food for 70-80% of registrants
- f. Wednesday Breakfast
  - i. Head table: Plenary speaker, President, Secretary, Pres-Elect, current LAC, next LAC
  - ii. AV: Screens and ability to project video, slide show, plenary power point; Microphone and lectern on dais
  - iii. Seating for 60%
  - iv. Guarantee food for 55-60% of registrants
- g. BREAKS – Heavier in the mornings; lighter in the afternoons. Guarantee for No More Than 50% of conference registrants
- h. President’s Receptions: Anticipate food for 60 Monday night and 50 Tuesday night.

# Physical Arrangements

---

## Function

To provide room, seating arrangements, audio/visual equipment, and signs for workshops, program sessions, special events and committee meetings prior to and during the annual meeting.

## Responsibilities

- A. Determines hours facility is available for access and arranges for security if needed.
- B. Works with LAC Chair to determine the required session and event room seating and arrangement.
- C. Works with President-Elect and LAC to assign meeting room space using the following criteria:
  - Requested room arrangement:
    - classroom setup,
    - boardroom,
    - theatre style, or
    - combination of theatre and classroom
  - Anticipated session/workshop attendance (80 for concurrent session, 40 for workshops).
- D. Works with facility and Corporate Partner Chair to develop layout for exhibitor booths
- E. Works with facility and LAC to develop a conferences services arrangement plan
  - Solicits list of preferred vendors from facility
  - Solicits quotes from vendors for booth setup (pipe, drape, tables, chairs, power cords, electricity, etc)
- F. Develops an audiovisual arrangement plan. If a local or facility service is used, the following specifications are used.
  - Determines the extent of the facility's accommodations concerning audiovisual and facility arrangements. Some facilities have exclusive arrangements with their own audiovisual department or an outside vendor. The ability to be selective in terms of cost for needed equipment may be hindered by such an arrangement; however, such an arrangement can prove extremely beneficial in that such firms have familiarity with the annual meeting site and usually have extra A/V equipment on-site. Convention services within the facility usually have names of recommended vendors if in-house arrangements are not already in place.
- G. Monitors A/V equipment and presenter connectivity prior to the beginning of each session to ensure that presentation is ready. Have A/V vendor place cards with on-site contact information in each presentation room.
- H. Prepares and places signs for all sessions, workshops, meal functions and special events, or coordinates with the facility if electronic signboards are in place.
  - Solicits quotes for signage production.
  - Determines if the facility has any restrictions on sign placement.
  - Determines the need for easels used to hold signs and if the quantity available through the conference facility is adequate to handle the need at any given point in time. If not, arranges for rental.
  - Determines signs needed by securing a copy of the preliminary program. Determines other signs as may be required, including:
    - session/workshop signs,

- session/workshop change/cancel board
  - directional signs,
  - registration signs,
  - exhibit area (including exhibitor, corporate partner, and exhibitor map) and
  - event signage.
- I. Prepares session signs by room by date (or day) by time, and including session number and session title for each entry.
- J. Arranges for the following:
- Board to display the photos and biographies for new honorary member recognition
  - Job announcements
  - General announcement/communication board
  - Easels for poster board sessions (coordinate with the EC on the expected setup for these since some poster boards were not on hard-back poster board and required clips to a board)
- K. Room set up guidelines:
- Opening Session
    - Head table: Pres, P-E, Secretary, LAC Chair, Speaker (if applicable), AACRAO rep
    - AV: Screens for PP slide show of committee members, conference details, themes, speaker information, etc. Microphone and lectern on dais.
  - Seating for 60% of registrants.
- Town Meeting
    - No head table
    - Microphone
    - Seating for 50% of registrants
  - Business Meeting
    - Head table for entire EC (set 16 chairs)
    - AV: Screens for projecting items for vote, Microphone and lectern on dais
    - Seating for 60% of registrants
  - Wednesday Breakfast
    - Head table: Plenary speaker, President, Secretary, Pres-Elect, current LAC, next LAC
    - AV: Screens and ability to project video, slide show, plenary power point; Microphone and lectern on dais
    - Seating for 60%
- L. Submits final report and recommendations to the LAC Chair as requested.

# Publicity & Publications

---

## Function

To promote the Annual Meeting through utilization of exhibit space, distribution of door prizes, and presentations at the annual meeting one year out; through written communication with the membership via the SACRAO Newsletter, SACRAO email distribution list, other regional publications and direct mail; and through the registration materials in the year preceding the annual meeting. Assists the President-Elect in the publication of the conference program. The SACRAO website is set up as a template for each annual meeting to put information up about the meeting, lodging, program, and activities.

## Responsibilities

A. Develops with the LAC a theme that can be used to promote the annual meeting, incorporating the related logo in the LAC letterhead, promotional, and registration materials. Themes in the past have helped promote the local area or state and were used on program covers and in titling social activities and decorations. Some themes used in the past include:

- 2014, Raleigh: Discover, Engage, Grow
- 2013, San Antonio: Deep in the Heart of Texas
- 2012, Northern Kentucky: A Tale of Two Cities
- 2011, Atlanta: Shaping Tomorrow
- 2010, Chattanooga: Renew, Reconnect, Recharge
- 2009, New Orleans: Laissez le 2009 SACRAO Rouler
- 2008, Williamsburg: Virginia Hospitality. . .
- 2007, Little Rock: Rockin' on the River
- 2006, Lexington: Splendor in the Bluegrass
- 2005, Myrtle Beach: In My Mind I'm Going to Carolina
- 2004, Fort Worth: Hitch Your Wagon to a Star
- 2003, Biloxi: Step up to the Challenge
- 2000, Memphis: Ducks in a Row
- 1999, Savannah: Rollin' on the River

B. Obtains promotional assistance through contacts with local Chamber of Commerce or Convention and Visitors Bureau and/or state Department of

Tourism for the following:

- promotional literature for distribution at the previous year's annual meeting,
  - news releases,
  - assistance with promotional mailings,
  - promotional video/dvd, and
  - door prizes (some agencies will not provide these but do have lists of local companies that will donate items or provide them at low cost).
- C. Develops a campaign for promoting the meeting at the prior year's annual meeting.
- Arranges to staff booth, which is provided at no charge.
  - Arranges for A/V equipment needed for the booth and/or Invitation Breakfast.
  - Identifies in advance state attendees who will attend the preceding annual meeting and enlists their assistance in staffing the booth and presenting the promotion at the Invitation Breakfast. Assign individuals to specific times based on their availability.
  - Works with state membership in soliciting door prizes for raffle drawings at booth and/or Invitation Breakfast. Or, buys a few nice items. Sources of potential door prizes
    - college/university bookstores,
    - the meeting hotel,
    - local restaurants,
    - local attractions, and
    - unique local businesses.
- Remember, you are promoting a meeting in their vicinity. A door prize of two complimentary meals may result in many other members from the annual meeting visiting the same restaurant.
- Secures materials for promotional booth, which should include the following:
    - promotional literature for distribution,
    - tour options if they will be offered,
    - items to decorate or lend atmosphere to the booth area ( music, posters, etc.),
    - box or bag to hold raffle tickets for drawings, and
    - bulletin board to display door prize winners and other promotional information.
  - Prepares and presents promotional activity



- (film, skit, etc.) at the Invitation Breakfast.
- D. Manage the online conference presence through website and Guidebook updates. Works with SACRAO VP IT and Webmaster to create annual conference shell by March after end of prior year's meeting.
- E. Reviews additional promotional efforts.
- Assists LAC Chair to develop articles during preceding year for inclusion in the SACRAO Newsletter and state/regional association publications. Include information on tours, airline service, hospitality, special events, keynote speaker, and other attractions.
  - Coordinates registration reminders to SACRAO membership when registration begins, throughout the registration cycle and again in early January shortly before the early registration discount ends.
  - In late December or early January, sends a communication about local highlights which includes web links to local literature and information from local Chamber of Commerce and/or tourism department. **Note:** Promotional materials should include information about the host city, annual meeting hotel, special events, travel arrangements, climate, etc.
- F. Solicits door prizes.
- Solicits donation of gift items:
    - items regionally manufactured, grown or crafted generally have great appeal;
    - everyone in the sponsoring association should be involved in the collection of prizes; and
    - provides a depository to store collected items.
  - Some LACs may prefer not to solicit door prizes and buy several nice items instead.
- G. Provides local information.
- Display menus and a locator map indicating proximity to the hotel of a variety of quality (not necessarily expensive) restaurants.
  - Provide literature, as appropriate to area, on:
    - local recreational attractions,
    - historically significant sites,
    - shopping malls,
    - local crafts and products, and
    - local cultural and entertainment activities spanning the annual meeting dates including the weekend preceding the conference.
  - Provides information on after-hours activities. Attendees will want to know where they can go dancing, where they can hear various types of music, and where the hospitality suite is located
- H. The number of spouses and/or children at a meeting has a direct relationship to the popularity of an area as a tourist attraction. Information should be available concerning local historical, cultural, and recreational attractions, shopping, dining.
- I. Works with President-Elect and LAC Chair to publish the conference program.
- Solicits quotes from local printers/publishers and works with LAC to select vendor to print conference programs.
  - Works with President-Elect and LAC to establish publishing timeline and publishing channels (print, web, Guidebook, etc)
  - Works with President-Elect to publish program
    - Get program file to printer,
    - Review blue-line two weeks prior to meeting
    - Ship programs to conference facility
    - Publish program on website and in Guidebook
- J. Submits final report and recommendations to the LAC Chair as requested.

# Registration

## Function

To provide an orderly process for registering members attending the Annual Meeting and generating a number of reports during and after the meeting.

## Responsibilities

- A. Monitors the SACRAO registration database application, which:
- collects basic demographic information on each registrant,
  - maintains basic accounting records on the different types of fees collected,
  - tallies enrollment figures for special limited sessions, workshops, special events, meals, and the like,
  - allows for the printing of reports upon demand, including name tags, and
  - provides web-based registration system with auto-generated electronic verification to registrants and on-line payment option.
  - Serves as LAC liaison with the SACRAO webmaster to update on-line registration site
- B. Works with the Finance Chair to establish a dedicated e-mail account (e.g., [sacrao2014@gmail.com](mailto:sacrao2014@gmail.com) or [sacraoannualmtg@gmail.com](mailto:sacraoannualmtg@gmail.com)).
- The e-mail address will be used for registrants' communication with the LAC.
  - The SACRAO webmaster will include the e-mail address in the on-line registration function.
- C. Coordinates with LAC Finance Chair to develop refund policy, deadlines and procedures, policy on unpaid registrations, and the updating of the registration database as payments are received.
- D. Orders the appropriate supplies needed for the registration mailing and on-site registration to include:
- Large (9 x 12) envelopes or binders to serve as registration packet.
  - Name badge and name badge holders.
    - Name badges should be continuous form computer stock (Avery 6-up, perforated).

- Name badge holders should be pouches with neck-strap or clip-on lanyard.
- VIP ribbons for officers, corporate partners, and guests  
([www.pcnametag.com](http://www.pcnametag.com)):

### Color ..... Group (Count)

Ryl Blue.....LAC.....	10
Lt Blue..... SACRAO Committee ..	40-50
Green..... Corporate Partner .....	100
Red .....	Executive Committee ..... 30
Teal .....	First-Time Attendee..... 200
Maroon ....	Guests..... 30
Canary .....	Honorary Member ..... 25
Violet.....	Past President ..... 20
White .....	President..... 1
Blue .....	President-Elect ..... 1
Rainbow ..	Presenter ..... 200
Orange .....	State Representative (Association Presidents)..... 12

- E. Coordinates e-blasts with the LAC Chair and Publicity and Publications Chair.
- F. Prepares registration packets for distribution at the annual meeting.
- Run reports from web database. Stuff alphabetically by last name, then add in extra event tickets, etc.
  - Envelopes should include:
    - Name badge and ribbons (if appropriate)
    - Tickets to events (use for door prizes)
    - Drink tickets
    - Event & drink tickets purchased for guests
    - We no longer put Corporate Partner flyers or printed attendee lists in the envelopes.
  - Bags should include:
    - Conference Program
    - Vendor Game
    - Any of the following if provided:
      - Local interest items
      - Invitation to next year's conference
      - Gift (e.g. notebook, water bottle)
  - Prepares extra envelopes and/or bags for walk-in registration. (~50 packets)
  - Schedules committee members and other LAC members to assemble the registration packets the Saturday before the conference start.

G. Reserves, designs, and staffs the registration area for the on-site registration.

- Reserves the appropriate facility space through the LAC Chair and Physical Arrangements Chair.
- Requests enough table/desk space to accommodate up to 4 individuals working the registration desk. (four 8' tables minimum)
- Determines electrical power needs and request enough electrical outlets/cords/etc. to meet that need.
- Distributes presenter gifts and session coordinator packets at registration.
- Live Internet connection and PCs and a printer (color, if available) are required for onsite web registration and database management. (1-2 laptops)
- Requests or prepares signs which will facilitate the on-site registration activity.
- Provides adequate staff to cover the registration hours (4-5 people are

recommended for peak hours on Sunday and Monday). Recommended hours of operation:

Saturday..... 2:00 P.M. - 6:00 P.M.  
 Sunday..... 10:00 A.M. 7:00 P.M.  
 Monday ..... 7:30 A.M. - 4:00 P.M.  
 Tuesday ..... 7:30 A.M. - 4:00 P.M.

- Develops basic information about the conference to assist registration personnel at the registration desk. Ensures all personnel are briefed on registration/financial procedures including refund information.
  - Secures all equipment, supplies, etc. each evening.
  - Secures participation of LAC Finance Chair to collect on-site payments. If not possible, the registration chair can receive checks, mark members as paid and print receipts.
- H. Submits final report and recommendations to the LAC Chair.

# Transportation & Outings

---

## Function

To be responsible for ensuring that adequate air and ground transportation is available for the annual meeting. In addition, tours to local educational, historical, or entertainment attractions may be scheduled if demand warrants.

## Responsibilities

- A. Work with Publicity Chair to determine what local attractions are of interest to visitors and to advertise their availability.
- B. Determines ground transportation needs and attempts to provide direct transportation from the airport to the hotel and return.
  - Determines what type of public transportation serves the annual meeting hotel from the airport. Contact private bus companies and shuttle services to obtain preferred rates.
  - Determines frequency of public transportation and hotel shuttle service, taking into consideration:
    - times and schedules, and
    - size of courtesy vehicles.
  - Has general information on taxi fares to local attractions, shopping areas, restaurants, night spots, etc.
  - Determines driving directions and local parking areas/costs.
- C. Provides the above information to SACRAO VP for IT for inclusion on the website by September prior to the annual meeting.
- D. Coordinates transportation to conference events (such as the Tuesday Big Event) if needed.
  - Works with LAC Chair to determine number of buses/shuttles needed for the event and the round-trip cycle time
  - Solicits quotes from area providers
  - Schedules volunteers to manage loading/unloading
- E. Coordinates any pre-/post-meeting tours.
  - Solicits proposals from several tour companies for day or half-day tours of the host city and the surrounding area, and recommends tours to LAC Chair for final approval.
- Ensures that any tour or event can accommodate handicapped visitors.
- Tours should be run through either the LAC or tour companies directly. If run through the LAC then:
  - Predetermines and publishes the tour registration deadline, cancellation, and refund policy.
  - Develops the registration forms and/or tickets
  - Collects payments and issues refunds. Finance activity should be coordinated with LAC Finance Chair.
    - Ensure the cost is sufficient to cover all related expenses but does not generate profits
  - Determines if local colleges/universities want to showcase any of their programs on campus and offer as tours. These should be programs on the leading edge of new, innovative, and/or creative initiatives.
    - Transportation costs, if not provided by the institution, should be nominal.
  - Solicits the assistance of additional LAC members for tours, ticket taking, etc.
- F. Coordinates outings such as the Fun Run or Golf outing.
  - Assess costs associated with outings
  - Outings should be owned by the LAC though they may receive corporate partner sponsorship.
  - All charges and revenues are run through the LAC Finance chair.
  - Any additional charges for t-shirts or prizes should be collected as part of the registration process.
- G. Submits final report and recommendations to the LAC Chair as requested.

# Appendix A: Finance Committee Forms

## Expense Voucher/Reimbursement Form

**Reimbursement Policy:** The SACRAO Local Arrangements Committee (LAC) will reimburse legitimate expenses, including travel, incurred in carrying out the Annual Meeting. United States government reimbursement guidelines will be used for hotel, meals, and incidentals. An expense voucher/reimbursement form must be submitted to document all expenditures, and include appropriate documentation (receipts, copies of tickets, etc.).

<b>Name</b>	
<b>Mail check to the following address</b>	
<b>City/State/Zip</b>	

<b>Purpose of Expenditure</b>	
-------------------------------	--

**Expenses for Material Goods/Services (Printing, Duplicating, Postage, etc.)**

Description	Date	Amount
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
A. Total Expenses for Material Goods and Services		\$
B. Plus Travel Expenses (from reverse side)		\$
<b>C. Balance Due</b>		<b>\$</b>

<b>Payee's Signature</b>	
Date:	Signature:

<b>Finance Chair Notes</b>		
Date:	<input type="checkbox"/> Check; #: <input type="checkbox"/> Check Card	Signature:

## Travel Expenditures

### Commercial Transportation (attach receipts)

From	To	Amount
		\$
		\$

### Personal Automobile (current state rate)

From	To	Total Mileage	Rate	Amount
			\$	\$

### Hotel (attach receipts)

Hotel Name	Check-In Date	Check-Out Date	Amount
			\$

### Meals (attach receipts for group meals, and list attendees; for individual meals, use state per diem)

Restaurant	Date	Meal Amount	Tip Amount	Amount
				\$
				\$
				\$
				\$
				\$
				\$
				\$
				\$
				\$
				\$
				\$
				\$
				\$
				\$
				\$
				\$
				\$
				\$
				\$
				\$
				\$

### Tolls, Local Transportation, Parking, Tips, Other (itemize and attach receipts)

Description	Date	Amount
		\$
		\$
		\$
		\$
		\$
		\$

<b>Total Travel Expenditures</b>	<b>\$</b>
----------------------------------	-----------



# Billing Statement

January 8, 2008

**Howard Grimes**  
 Registrar Coordinator  
 2555 Northwinds Pkwy  
 Alpharetta, GA 30004

**SACRAO 2008 Annual Meeting**

Regular Registration .....	175.00
Workshop Fees:.....	\$0.00
Fun Run: .....	\$0.00
Amount Received:.....	\$0.00

**BALANCE DUE: ..... \$175.00**

SACRAO Federal Tax ID#: 56-1451843  
 Make checks payable to SACRAO; remit to:  
 Robert LeHeup  
 SACRAO 2008 Treasurer  
 c/o University of Virginia Student System Project  
 PO Box 400875  
 Charlottesville VA 22904-4875



# Refund Statement

January 18, 2008

**Magdalena Hinojosa**  
c/o Marina Escobar  
University of Texas Pan American  
11201 W. University Dr.  
Edinburg, TX 78539

**SACRAO 2008 Annual Meeting**

Regular Registration .....	175.00
Workshop Fees:.....	\$0.00
Fun Run: .....	\$0.00
Amount Paid:.....	(\$175.00)

**REFUND DUE: ..... \$175.00**