Bylaws Supplement of

San Francisco Paralegal Association

A California Nonprofit Public Benefit Corporation

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SUPP 4.1 ADDITIONAL POLITICAL ACTIVITIES

San Francisco Paralegal Association (the "Corporation") is permitted to attempt to influence legislation through lobbying, as long as lobbying does not constitute a "substantial part" of its activities and expenditures. No more than five (5) percent of the Corporation's activities and expenditures shall be devoted to lobbying.

If the Corporation wants to devote more than five (5) percent of the Corporation's activities and expenditures to lobbying, the Corporation must make an election under Internal Revenue Code section 501(h). To make an election, the Corporation must file Internal Revenue Service ("IRS") Form 5768, Election/Revocation of Election by an Eligible Section 501(c)(3) Organization to Make Expenditures to Influence Legislation. If the election is approved by IRS, the Corporation may devote no more than twenty (20) percent of the Corporation's activities and expenditures to lobbying.

If the Corporation wants to devote more than twenty (20) percent of the Corporation's activities and expenditures to lobbying, the Corporation must create a separate 501(c)(4) nonprofit social welfare corporation.

SUPP 6.7-1(B)(I) SAMPLE MEMBERSHIP MEETING NOTICE

SFPA
SAN FRANCISCO PARALEGAL ASSOCIATION

MM/DD/YYYY

NOTICE OF [TITLE OF MEMBERSHIP MEETING] OF THE SAN FRANCISCO PARALEGAL ASSOCIATION

According to section 6.8-4 of the Bylaws of the San Francisco Paralegal Association, the Board of Directors hereby gives notice of the Annual General Meeting of the San Francisco Paralegal Association which will take plan on [Month, Day and Year] at [Time] at [Venue].

[Agenda of the Membership Meeting]

SUPP 6.8-1 EVENT PLANNING GUIDE

See Attachment 1.

SUPP 6.8-6(A) SAMPLE BALLOT AND SAMPLE PROXY

SFPA
SAN FRANCISCO PARALEGAL ASSOCIATION

ELECTION OF THE
SAN FRANCISCO PARALEGAL ASSOCIATION
OFFICERS AND DIRECTORS

Position	**Name**	✓
President		
Vice President		
Secretary		
Treasurer		
Directors		

____
[Name]

SFPA

SAN FRANCISCO PARALEGAL ASSOCIATION

MEMBER PROXY FOR THE
SAN FRANCISCO PARALEGAL ASSOCIATION
ANNUAL MEETING

I, ____, hereby provide my proxy to ____ (who is also a member of the San Francisco Paralegal Association) for member votes to be taken at the San Francisco Paralegal Association's Annual Meeting as detailed below:

Date: ____

Meeting Name: ____

Meeting Date: ____

Member: ____
(Signature)

Proxy Recipient: ____
(Signature)

Email or mail this member proxy to the San Francisco Paralegal Association, 101 California Street, Suite 2450, San Francisco, CA 94111-6102.

SUPP 7.5-3(C) SAMPLE BOARD MEETING NOTICE

SFPA

SAN FRANCISCO PARALEGAL ASSOCIATION

MM/DD/YYYY

NOTICE OF BOARD MEETING OF THE SAN FRANCISCO PARALEGAL ASSOCIATION

According to section 7.5-2 of the Bylaws of the San Francisco Paralegal Association, the Board of Directors hereby gives notice of a Board Meeting of the San Francisco Paralegal Association which will take plan on [Month, Day and Year] at [Time] at [Venue].

[Agenda of the Board Meeting]

SUPP 7.5-4 SAMPLE WAIVER NOTICE

SFPA

SAN FRANCISCO PARALEGAL ASSOCIATION

WAIVER OF NOTICE

The undersigned Directors hereby waive all formal requirements of notice as the Board of Directors meeting of [Day, Month and Year].

Date: ______________________

____
[Name], Secretary

____
[Name], Director

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[Name], Director

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[Name], Director

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[Name], Director

____
[Name], Director

____
[Name], Director

____
[Name], Director

____
[Name], Director

____
[Name], Director

SUPP 7.5-6 BOARD MEETING RULES OF PROCEDURE

The Board of Directors shall conduct their meetings in accordance with the latest version of Roberts Rules of Order.

SFPA
SAN FRANCISCO PARALEGAL ASSOCIATION

UNANIMOUS WRITTEN CONSENT IN LIEU OF
A BOARD MEETING OF THE
BOARD OF DIRECTORS OF THE
SAN FRANCISCO PARALEGAL ASSOCIATION

The undersigned, being all of the Directors of the San Francisco Paralegal Association, a Corporation incorporated under the laws of the State of California, in lieu of holding a Board meeting hereby consent to the adoption of the following resolution, agreeing that this resolution shall have the same force and effect as if unanimously adopted at a meeting of the Board of Directors at which all Directors were present:

[Resolution Details]

RESOLVED, that in lieu of holding a meeting of the Board of Directors, we approve Resolution [Number].

Date: ________________________

____
[Name], Secretary

____
[Name], Director

____
[Name], Director

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[Name], Director

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[Name], Director

____
[Name], Director

____

[Name], Director

[Name], Director

[Name], Director

[Name], Director

SUPP 7.6 SAMPLE REIMBURSEMENT FORM

SFPA
SAN FRANCISCO PARALEGAL ASSOCIATION

REIMBURSEMENT FORM

Date: ______________________
Name: ____

Description	Expense	Payment Method
	$	
	$	
	$	
	$	
	$	
	$	
	$	
	$	
	$	
	$	

Please enclose a copy of the invoice(s) and receipt(s) for the above expenditure(s).

____
[Name]

SUPP 8.4 POSITION DESCRIPTIONS

SUPP 8.4-1 President

The President is the chief executive officer of the Association, the chairperson for all Board meetings, the administrator of all internal affairs, and the ex officio member of all committees and practice sections. The President's responsibilities include:

- Advancement of the paralegal profession in the San Francisco Bay Area, the State of California, and elsewhere;
- Network with interested parties from corporations, law firms, and other nonprofits to expand the reach of the Association;
- Network with leadership from other paralegal associations;
- Draft agendas for all Board meetings;
- All other responsibilities as assigned by the Board.

SUPP 8.4-2 Vice President

The Vice President, in the absence of the President, shall assume the duties of the President. The Vice President shall also assist in the administration of all committees and practice sections. The Vice President's responsibilities include:

- Collect and present to the Secretary all written reports of the Chairs of all committees and practice sections;
- Providing all needed resources to the Chairs of all committees and practice sections; and
- All other responsibilities as assigned by the Board or President.

SUPP 8.4-3 Secretary

The Secretary shall be the custodian of all records of the Association. The Secretary's responsibilities include:

- Circulate immediate and monthly email blasts;
- Draft correspondence for the Board and President;
- Draft minutes for all Board meetings;
- Maintain nonprofit compliance with California Attorney General and California Secretary of State;
- Publish all membership notices, including waiver notices;
- Update membership lists for email marketing accounts; and,
- All other responsibilities as assigned by the Board or President.

SUPP 8.4-4 Treasurer

The Treasurer shall have charge and custody of and be responsible for all funds of the Association. The Treasurer's responsibilities include:

- Deposit monies in all appropriate Association depositories;
- Maintain merchant service accounts for the Association;
- Maintain nonprofit compliance with California Franchise Tax Board and Internal Revenue Service;
- Pay all invoices for the Association;
- Publish Annual Report of the Association;

- Submit monthly report to Board with current depository balances and monthly profits and losses;
- Verify membership dues payments and activate membership accounts in the User Management System of the website; and,
- All other responsibilities as assigned by the Board or President.

SUPP 8.4-5 Directors

The Board of Directors shall be responsible for the administration and decisionmaking of the Association. A Director's responsibilities include:

- Active involvement in one or more Committees;
- Attendance and active participation at all Board meetings;
- Involvement in the planning and execution of all events; and
- Submission of all requested and required reports;

SUPP 8.4-6 Practice Section Chairs

The chairs of practice sections are responsible for the development of legal practice area specialization within the Association. The practice section chair's responsibilities include:

- Involvement in the planning and execution of practice section meetings at least once every month;
- Submission of all requested and required reports

SUPP 8.4-7 Committee Chairs

The chairs of committees are responsible for critical functions of the Association. The committee chair's responsibilities include:

- Activate participation in the advancement of the mission statement of the Committee; and
- Submission of all requested and required reports

Attachment 1

Event Planning Guide

Introduction – Event Planning Committee

The Event Planning Committee is responsible for planning, organizing and conducting SFPA events. It shall consist of members of whom each member shall be assigned to specific duties as follows:

Committee Chair: The Committee Chair is responsible for coordinating the activities of the Event Planning Committee. He or she will schedule regular meetings with the Committee to ensure that all action items are being completed in a timely manner; that SFPA policies are being followed; and keep the event moving on track to a successful conclusion.

Speaker Liaison: The Speaker Liaison is responsible for action items associated with the speakers. He or she will contact potential speakers to get them signed up for the event; send confirmation and update correspondence to the speakers; arrange to obtain their presentation outlines and materials; work with the SFPA CLE Coordinator to obtain CLE credit, where applicable; follow-up with the speakers to ensure that there are no issues or problems and resolve speaker any such issues or problems; and, generally, work with the speakers to ensure that they have all of the necessary information to make a successful presentation. The Speaker Liaison will be responsible for ensuring that speaker gifts, honoraria, expense reimbursements, *etc*. are all handled in accordance with SFPA Policy.

Vendor Liaison: The Vendor Liaison is responsible for recruiting and signing vendors to sponsor or exhibit at the event. He or she will work with the vendors to ensure that the vendors have the necessary information for their sponsorship or exhibition; collect the requisite fees from the vendors; arrange the exhibit space in conjunction with the site coordinator; and, generally work with the vendors to ensure that they have a positive experience in their sponsorship of the event.

Site Coordinator: The Site Coordinator will locate, inspect and secure appropriate venues for the event. He or she will be responsible for contacting the venue; sending requests for proposal; reviewing, organizing and maintaining those proposals; present the proposals to the Committee with recommendations for venue selection. He or she will work closely with the Vendor Liaison to ensure that exhibition space is adequate for the needs of the event; and work with the Food & Beverage Coordinator regarding the food and beverage requirements for the event.

Food & Beverage Coordinator: The Food & Beverage Coordinator is responsible for getting requests for proposal and/or bids related to any food and/or beverage to be served at the event. He or she will work closely with the Site Coordinator to ensure that refreshments are ordered and ready for the event.

Registrar: The registrar will be responsible for maintaining registration lists; answering questions from would-be conference attendees; providing registration information to the Committee and the Board as requested; manage registration including collection of fees; manage registration staff and any other attendant duties related to registration before and at the event.

Marketing Coordinator: The Marketing Coordinator will work with the Committee to develop an advertising and marketing plan for the event to ensure the maximum number of attendees. He or she will work with the editor of the *At-Issue* newsletter, the Systems & Technology Committee and the CLE coordinator to ensure that the event is advertised, marketed and promoted. The Marketing Chair should also lead the production of the Program Materials.

The above duties can be distributed among the members of the Event Planning Committee in whatever manner works best for the Committee. They are not meant to be hard, distinct positions, but rather a guide to the assignment of tasks and duties to assist the Committee in planning a successful event. The Committee should be flexible enough to assign its responsibilities as necessary, but the above division of labor will likely lead to a successful event.

2. Overview

In planning an event or conference, the organizer can create a number of possible designs. This design and creation is of high importance, because no matter how good the program design is, it will lose value if not properly executed.

The process begins by answering three questions:

1. What is the purpose of the conference?
2. What is the audience you are trying to reach?
3. How many participants are expected?

These questions must be considered when developing your conference sessions, presentation methods and scheduling. Failing to take into account these questions when planning your conference, invariably leads to a poorly executed program. You must design the best combination of sessions, presentation methods, and scheduling to serve the needs of your participants and further the goals of your conference.

A. Sessions

- **Registration.** All conferences need a registration period. Participants must check -in, pick up program materials, and receive conference information.

- **Opening Session.** Your conference should begin with an opening session that features a speaker who welcomes the participants to the conference. For the San Francisco Paralegal Association, the welcome address should be made by an executive officer of the Association. He or she should:

  - Welcome the participants and officially open the conference;
  - Give a brief history of the Association and the purpose of the conference;
  - Tell the participants what to expect from the conference; and,
  - Depending on the format, direct the participants to the appropriate place for the sessions.

  Ceremonies, award presentations, musical groups, film presentations, or other exciting events may be part of the opening session. The energy level of your group will be extremely high at this time.

- **General Sessions.** General sessions, also known as plenary sessions, are gatherings of all the participants together. These may include food functions, opening and closing sessions, entertainment sessions, business sessions, or sessions to discuss topics of interest to all conferees.

- **Follow-up Sessions.** These sessions provide additional time for a small group to discuss topics presented at a previous session and should include the presenter or speaker from the first session.

- **Concurrent Sessions.** When two or more sessions are held at the same time they are known as concurrent sessions. These sessions may divide conferees into groups so that an equal number of conferees attend each one, or they may be presented so that conferees have a choice of which sessions to attend. Various presentation methods can be used in concurrent sessions.

- **Breaks.** In between consecutive sessions you should schedule a break. Breaks may be as short as ten minutes and last as long as thirty minutes. When soft drinks or snacks are available, it should be designated as a refreshment break. Breaks tell your conferees that there is a schedule, and, to help them keep that schedule, you have planned time for restroom visits, traveling, stretching, smoking, etc.

- **Workshop.** This is a group assembled to discuss a common issue, problem, or interest. Frequently, "workshop" is used to refer to a concurrent breakout session.

- **Closing Session.** Conferences that end without a closing session send conferees away feeling a little empty. Closing sessions should uplift conferees and send them away feeling informed, renewed, and energized. Ceremonies, special videos, entertainment, reports from work group sessions, or presentations made by convention bureau representatives from the site of next year's conference work well also.

- **Banquets.** For purposes of this section, banquets include plenary breakfasts, luncheons, dinners, or other food functions at which all conferees will gather together. These functions should have a purpose. Consider the following possible purposes:

    - To offer fellowship, nourishment, and nothing more.
    - To set the mood for the following event.
    - To relax the group after a particularly taxing session or day.
    - To make awards, presentations, or announcements.
    - To provide entertainment.
    - To present guest speakers.
    - To offer a transitional period to bridge two segments of the conference.

- **Receptions.** Receptions can vary greatly in their degrees of formality. They provide a period for people to talk and to meet each other and the association's officers or local officials. Receptions can be used to entertain, to keep attendees from wandering, or to prepare for an upcoming event. These events are particularly helpful in providing networking time for large conferences.

- **Tours/field trips.** These trips are usually scheduled for entertainment purposes or to provide a convenient way of visiting local attractions. However, you may schedule a trip as part of conference business. For example, a tour of a model facility could be planned, followed by or preceded by a session at the conference site to discuss the tour.

- **Free Time.** Free time is simply any break period of more than thirty minutes when conferees have time to do what they want. Free time allows conferees to take care of business matters, attend exhibits, purchase conference items, shop, check out, or simply prepare for a special part of the conference program.

B. Presentation Methods

- **Buzz group or buzz session.** In a buzz session the audience is divided into small groups for a limited period of time. Each group member is asked to contribute his or her ideas or thoughts. Buzz sessions can be used to develop questions for a speaker or panel, offer ideas regarding how to address an issue in the future, or react to the information that has been presented in the session. Buzz groups can be used in general sessions or concurrent sessions.

- **Case study.** A case study provides a detailed report of an incident or event through either an oral or written presentation, and sometimes on film. A discussion usually follows the presentation of a case study. This is a very effective presentation method for large workshops.

- **Clinic.** A clinic is a session in which participants respond or react to a common experience. A clinic may be used as a follow-up session after a field trip.

- **Colloquy.** This is a modified panel presentation in which half the panel represents the participating audience and the other half are experts or professionals in a field related to the discussion topic. Presentation time is equally divided between the two groups. This is an effective way of discussing issues from different points of view and getting the audience involved in the discussion.

- **Debate.** In a debate, two individuals or two teams present two opposing views of a common issue. Each side is given equal time. A moderator is assigned and generally the audience listens rather than participates. Be flexible; it is the role of the moderator to keep the presentations on schedule, raise relevant questions, and allow each presenter time to respond.

- **Dialogue.** This type of presentation requires a high skill level for presenters. Two individuals discuss issues in an in-depth conversation, but their views don't need to be different or opposing. This is not recommended for a large general session.

- **Interview.** Using this method, one or more people respond to questions from an interviewer. This is particularly effective for a concurrent session in which the person being interviewed is an outsider who has expertise or skills that easily transfer to victim services.

- **Panel.** This involves a group that makes an orderly presentation on an assigned topic. The audience may or may not ask questions or participate in the discussion.

- **Role Playing.** Role Playing uses participants to act out real-life situations. There is no script; players' actions are spontaneous. A discussion with the audience usually follows the role playing.

- **Speech**. In a speech, one speaker makes a formal oral presentation. It is usually a one-way communication.

- **Skit.** This is a short rehearsed presentation with a planned script. It works best in concurrent sessions. The audience may or may not participate. The purposes of a skit are varied--to entertain, to shock, to illustrate, or to provoke thought.

- **Work Groups.** Usually, the audience is divided into groups with a the goal of producing a product at the end of discussion. A group leader is selected to present the thoughts of the work group to the whole session. Everyone is given an opportunity to participate in the groups. The products of the groups may be presented immediately after group discussion or at a later session.

C. Scheduling

Most scheduling decisions are a matter of common sense. You should consider the impact of your scheduling decisions without getting overly concerned about having the perfect schedule. Following are some tips to help you plan your schedule of events:

- **Tip 1:** When overnight accommodations are required, schedule registration periods and events after hotel check-in is available and before check-out is required. When this is not practical, be sure to arrange for safe storage of luggage and schedule free time for check-out.

- **Tip 2:** Vary events between those with no alternatives and those that offer choices. Conferees like choices, and choices should be available to accommodate different skill and experience levels.

- **Tip 3:** When a conference lasts longer than a day, schedule free time. A conference day is longer than a normal work-day, and sometimes more draining.

- **Tip 4:** Spread intense sessions. Follow an intense session with free time or a lighter session.

- **Tip 5:** Schedule sessions with stimulating presentation methods after lunch. Energy levels are lowest after lunch; stimulating sessions prevent sluggishness.

- **Tip 6:** Schedule breaks in between sessions. This has been mentioned before but is worth mentioning again.

- **Tip 7:** When conferees are "on their own" for lunch, provide information about restaurants, prices, and service time. Your conferees will appreciate this and it will help to keep your conference on schedule.

- **Tip 8:** Large groups need more time for networking than smaller groups. Allow for adequate networking time in your schedule so participants can learn from each other and from conference staff.

D. Program Content and Format

A committee should be created to facilitate program planning. It is the responsibility of the Committee to:

- Conduct meetings and conference calls;
- Follow-up on action items;
- Develop the conference theme, format, educational and business content, and social programs;
- Develop program submission and review protocols;
- Acknowledge receipt of abstracts and provide status to authors;
- Review a prior year conference evaluations in order to provide committee with insight and suggestions for potential topics or speakers;
- Select topics, tracks, speakers, session schedule, moderators, poster presentations, keynote speakers, and learning objectives;
- Arrange meeting logistics, exhibits schedule, social activities, ancillary meeting schedule, any pre- or post-conference symposia or courses, and continuing education requirements vis-à-vis structure and educational content;
- Prepare conference agenda and program and finalize for external use.
- Monitor and report on progress of session development, speaker cancellations and changes.

3. Selecting The Date

Is your meeting scheduled during peak meeting season or during the holidays? If so, book accommodation, speakers and audio/visual support at least six months prior to your event date. Remember that peak meeting season is between the months of February to June and September to November. It is important when considering your date, that plan ahead to secure a venue if planning during the peak season. You should also avoid planning your conference for major holiday weeks. These include:

- New Year,s
- Easter
- Passover
- Memorial Day
- July 4th
- Labor Day
- Thanksgiving
- Christmas
- Chanukah

<u>Helpful Reminders</u>

- Allow time for set up & rehearsal
- Allow time between sessions to re-set rooms
- Book meeting rooms in 24 hour time blocks
- Verify each presenter's audio-visual requirements
- Verify when presenters will arrive & rehearse
- Check room capacity for seating and AV equipment
- Consider line of sight obstacles (pillars, chandeliers)

<u>Avoid Unexpected Costs</u>

- Check for secured storage supplied by the venue
- Schedule rooms to avoid having to re-set the audio-visual
- Re-confirm audio-visual equipment needs 2 weeks before event date

When possible, it is best to select a date at least six months in advance. This will provide you and your committee ample opportunity to complete all tasks necessary to make the event a success.

The San Francisco Paralegal Association has traditionally held events on weekdays, but don't feel compelled to do so. We had success with the 2011 Paralegal Day held on a Saturday. You should consider different dates and times while recognizing that the composition of your attendees may be affected accordingly.

4. Site Selection & Inspection

Once you know what kind of function you're holding and have set a tentative date, you can decide what kind of venue will be appropriate.

Look at the history of what SFPA has done in years past and use it to help guide your options. Perhaps there were certain locations that attracted more attendees than others. SFPA maintains a database of venues that is accessible by Practice Section and Committee Chairs as well as Board members. To access this database, go to the portal pages of www.sfpa.com. But don't feel that you must use one of these venues. If you can locate suitable alternatives, feel free to use that alternative.

Then, consider the pros and cons of the venue. You should factor in location and issues related to transportation, housing (for out of town participants,) available entertainment venues nearby and other attractions. However, always keep a clear eye on the meeting's ultimate goal. Michelle Issing, general partner at Designing Events, a meeting management company in Baltimore, wrote: "*If you're hosting an event to impress clients, that's different than if you're an association hosting an event for your members."*

Be sure the venue can set up a group registration area for the attendees and that they'll be able to handle shipments before you arrive, if necessary. You'll want to deliver all your registration materials, booklets, gifts and other materials before the event, if possible, and you'll want to find out exactly who will be receiving these items—get each person's name, title and direct phone extension. Make sure the location has space (and enough outlets) for AV equipment in the main room as well as in the smaller rooms for "breakout" sessions.

At this point, it's key to honestly think about who is coming to the event. It matters if the group is comfortable traveling to more out of the way destinations or whether they'd prefer to stay within a certain neighborhood. Your event's locale also depends on the number of people you're expecting and the specifications required by the company.

Be sure to look for the basics during an on-site visit. Visit the venue when it's at full-occupancy and there are plenty of meetings taking place, as well as when it's empty. Make sure the venue can accommodate your meeting. This is the time to be truly detail-oriented. No matter what venue you pick, expect to put down a deposit on the space and be sure to ask exactly what's included in the usage fee (for example, meeting space, complimentary breakfasts, coffee breaks and additional meeting space should you need it.)

A. Site Selection Tip Sheet

Some of this is going to seem obvious, but then taking care of the obvious should be ingrained into the very fiber of an event and meeting planner.

Before You Go

- Ask the facility for references from planners who have held meetings there recently.
- Does the facility have certain dates available that could provide you with lower room rates? Can the group have meals and functions separately? Are there special menus to choose from?
- Send your preliminary agenda and AV list along before you go, as well as your banquet requests. Include in this document any or all special accommodation or setup needs. For example, you might need a particularly large stage. This gives the facility time to prepare for your meeting.

- Discuss the number of attendees.
- Is the venue ADA (wheelchair) accessible?

When You Are There

- Get the name, address, telephone and fax numbers, and email addresses of the facility, and double-check the spelling for your invitations.
- Check out meeting rooms personally, when they are in use as well as when they are empty.
- Check out the grounds, the ease of access, the reception area. In hotels, check out the front-desk people and the ease of check-in and check-out.
- Are the ashtrays clean in the smoking rooms?
- Does the food look appealing?
- Do the chairs look (and, more importantly, feel) comfortable?
- Is there a convenient coat check, and is there sufficient staff to head off long lines?
- What is the facility's rules for extra signage? Will you get adequate display?
- Are the meeting rooms private and sound-proof?
- If this is a hotel, is there a weekend rate for guests staying on after the meeting is over?
- Are there adequate lighting and ventilation controls?
- Are there enough electric outlets?
- Are there sufficient phone jacks for modems?
- Are there enough elevators for attendees rushing to events?
- Would it be difficult to see/hear a speaker from the back of a meeting room?
- How wide is the room? Is there room for a podium, head table, screen and whatever else you'll need?
- Is there an adequate number of restrooms?
- Is the exhibit space very far from the meeting rooms?
- Is there a business center on site or close by for copies and emails?
- Is the venue itself in a safe part of the city?

Some Other Questions You Should Ask

- What is the latest date until which the facility will hold the rooms? (Don't be pressured to sign on the spot.)
- Will the facility receive and store registration boxes and delegate kits ahead of time, and if so, at what charge?
- Is there state-of-the-art AV equipment on hand? And the staff to do the inevitable troubleshooting?
- How soon can the rooms be set up?
- Is the facility unionized? Are there any contracts coming up for renewal that might precipitate a strike?
- Can the facility create a message center for your attendees?
- Are there any renovation plans in the works? (If so, the noise can be a factor; there's nothing worse for speakers than to be drowned out by jackhammers).
- When are rooms normally setup?
- Is there an accessible dock and elevator for contractors bringing in equipment and staging?
- What is normally provided by the facility as part of the room? (microphones, house sound system, flipcharts, lecterns, etc.)
- What is the "true" ceiling clearance?
- What is the lowest ceiling point in the room?
- Are there obstructions (low-hanging chandeliers, columns)
- What about any light sources or reflective surfaces (windows, mirrors)?
- Is there a house phone in the room? Can it be disconnected?
- How soundproof are portable walls?
- What will be going on in adjacent rooms?

- Where are the entrances and exits? What can be blocked by A/V stands, stages or seating?
- Do doors squeak? Close completely? Automatically lock?
- What is the “true” meeting space?
- Is there room for A/V setup and a control console?
- Does the room have a permanent stage? Stage lighting? Sound system?

Sound system
- Who handles the sound in the facility? Is there a patch fee?
- Is there a good quality sound system in the room? (Ask for a demonstration)
- Are portable sound systems available (sound lecterns, etc.)?
- Can the rooms be patched for audio recording from a central location?

Lighting
- Where are the house lighting controls? Can they be remote controlled?
- Can room lighting be divided into sections?
- Are “follow spotlights” available? At what cost?
- If stage lighting is to be hung from the ceiling, what are the restrictions? Where can it be hung? Who can do the work? Is there a reflected ceiling plan available?
- Are there man lifts, scissor lifts or basket lifts available from the facility? If so, at what cost? If not, from whom?

Electrical
- Where does the electrical service originate in the room?
- Who provides hook-up service?
- Do they also provide distribution of the service?
- What is the cost for hook-up and use?

Communications and computers
- What type of telephone, data and high-speed transmission service is available in the facility (Analog phone line, digital phone line, ISDN lines, T1 line, other)? At what cost?
- Is there a Business Center capable of helping with computer presentations?

A/V Requirements for Speaker Presentations
- Does speaker prefer handheld or lavaliere (lapel) microphone?
- Does speaker prefer wireless or wired microphone?
- Is a mixer required? If so, how many?
- One wired podium mic (handheld) or wired lavaliere microphone does not require a mixer
- More than one microphone of any kind usually requires a mixer
- Standard mixers have 4 channels and can handle 4 microphones. If a speaker wants 5 to 8 microphones, two standard mixers or one 8-channel mixer will be required
- Is a sound technician needed?
- For 1 to 4 mics, a sound technician is not normally required
- For more than 4 mics, a sound technician is always required
- Is speaker providing mic? Patch fee may apply
- Will other input devices be used (videotape players, audio cassette players, etc.)? If so, how many? Will additional mixers be required?
- How many computers? Provided or rented? Are power cables, phone cable extensions, etc. included?
- Does the speaker need an Internet connection? If so, what speed (modem, ISDN, T-1)?
- If using a laptop, is power supply or adapter needed?
- Is an LCD projector needed?
- Communicate A/V requirements to A/V contractor as soon as possible. Some equipment may need to be special ordered

B. Simultaneous Translation

The San Francisco Paralegal Association has members that are deaf or hearing impaired. Be prepared to offer an alternative to these members. Court reporting services have, in the past, transcribed our function through LiveNote Realtime allowing our deaf members to read the transcript as it was transcribed. Alternatively, we can seek a sign language interpreter to provide real time translation. These are things that should also be considered when locating your venue.

5. Selecting the Speaker

The San Francisco Paralegal Association has a number of speakers that have been used in the past. Their names, topics of discussion, contact information and evaluation ratings (where available) can be found in the speaker database. SFPA maintains a database of speakers that is accessible by Practice Section and Committee Chairs as well as Board members. To access this database, go to the portal pages of www.sfpa.com. However, don't feel that you must use a speaker from this list. SFPA is always looking for new and dynamic speakers that can competently address various issues – both for CLE and non-CLE events. If you locate a speaker that you believe would be an asset and provide useful information and material for presentation, by all means, arrange for that speaker to be featured.

After you have arranged for your speaker, your committee must appoint someone to act as a speaker liaison. It is the Speaker Liaison's responsibility to coordinate with your presenters, the venue and committee to ensure that the speaker has everything he or she will need to make their presentation. The Speaker Liaison should:

- Prepare and mail to the speaker (and moderator) a confirmation packet including cover letter, registration procedures, travel and hotel information, where applicable, a copy of SFPA's reimbursement policy, oral and poster presentation guidelines, and deadlines for submission of AV requirements, CVs, electronically-formatted presentations, and hand-outs;
- Prepare and mail abstract rejection letters;
- Invite and/or confirm keynote speakers;
- Confirm participation by co-sponsoring organizations, if applicable, including co-sponsors' obligations;
- Maintain speaker a check-list; collect speaker requirements and presentation materials; communicate room setup and technical information to hotel and AV vendor;
- Respond to general inquiries, or refer to appropriate faculty or to your staff;
- Monitor progress of session and track development, speaker commitments, changes and cancellations, session descriptions; provide periodic program (agenda) updates to committee, faculty and your staff;
- Where applicable, collect, review for accuracy, and load electronic presentations onto computer according to session date, time, room, track/topic, sequence of speaker;
- Ensure speakers are registered and that name badges and tent cards are produced;
- Assure adequate support for presenters on-site (meet and greet, speaker ready room, technical briefing, and production support;)
- Prepare post-conference thank-you letters to moderators and speakers, and expedite travel reimbursements;
- Arrange for certificates of appreciation;
- Arrange for appropriate speaker gifts, where applicable.

6. Pre-Event Arrangements

Before the conference, the Committee must ensure that certain action items are appropriately addressed. A member of the Committee should be assigned primary responsibility for certain functions as outlined in Section 1, above. Following is a guide to assist you in assigning and meeting those actions items:

A. Staff Assignments

Committee member and volunteers should be assigned to the following tasks:

- Registration table;
- Cashier;
- Ticket collection;
- Usher and/or escorts, where applicable;
- Distribution of Posters, Signage, Seating Lists, Place Cards, Menus, Programs, Gifts;
- Speaker's attendant;
- Room set-up supervision;
- Food service supervision and clean-up;
- Sign-in sheets

All staff should be versed in:

- Seating procedures for the event;
- Informing attendees of location changes;
- Assignments at alternate locations;
- Handling admission, tickets, cash collection;
- Special meal requests.

B. Financing

It goes without saying, that major events are a significant source of revenue for the San Francisco Paralegal Association. It is incumbent upon the Committee to ensure that revenues are being collected in accordance with SFPA policy and that expenses remain in budget. To ensure that major events are being managed in a fiscally sound manner, SFPA has created an event management spreadsheet that includes worksheets for a timeline checklist, registrant, speaker and vendor/contributor tracking, budget worksheets for gross income, expense and net income. This form can be found in the portal pages of www.sfpa.com and is available to all Practice Section and Committee chairs and any member of the Board of Directors. Expenses expected to be incurred that fall outside of the proposed budgetary allowance must be approved by the President or Treasurer.

The budget should contain the following considerations:

Income Items

- Registration Fees;
- Guest Tour Fees;
- Tickets (Banquet, Dinner, Other;)
- Exhibit Booth Sales;
- Sponsorships;
- Advertisement Sales;
- Proceedings (Tapes, etc.;)
- Interest earned, where applicable; and,
- Item sales.

Expense Items

- Overhead (Office Supplies, Equipment, etc.;)
- Site Selection Costs;
- Space/Facility Rental;
- Audio/Visual Services;
- Speakers (Honoraria, Travel, Meals, Other;)
- Food and beverage;
- Program Committee (Volunteer) Costs;
- Gratuities, where applicable;
- Design and Production of Print Material;
- Printing, Photocopying;
- Advertising Costs;
- Shipping;
- Equipment Rental (Computers, Copiers;)
- Phone;
- Bank Charges (Processing Credit Cards;)
- Postage;
- Registration Booths;
- Photography;
- Decoration;
- Signs;
- Exhibit Expenses;
- Awards;
- Gifts, Amenities;
- Transportation;
- Miscellaneous.

C. Pre-Event Registration Procedures

SFPA encourages advance registration for each of its events. The Committee must set up registration protocols for the event that include procedures for advance registration as well as "day-of" registration. (*See, Event Management for "day-of" registration protocols*."

Advance Registration should be set-up online through use of the SFPA website (www.sfpa.com.) The Chair of the Systems & Technology Committee is able to assist the Event Planning Committee with set up and design of the registration. We encourage all participants to register online where possible. The online registration form should be a web-based duplicate of any paper registration forms that are created for the event. Appendix 1 is a sample registration form for the event.

Advance registration should be open at least 90-days before the event and include a discounted rate. "Day-Of" Registration at the event will include a slightly higher "fee to accommodate for additional processing.

To set up your registration protocols:

1. *Review*
   - Past Attendance, Arrival/Departure Patterns, Registration Procedures
   - Available Personnel, Facilities
   - Classifications of Registrants (Member, Exhibitor, Speaker, Spouse, Guest, Other)
   - Identification Required to Register
   - Information to be Collected on Registration Forms

2. *Evaluate Registration Methods*
   - Advance Using Paper Form
   - Advance via Web, Using Online Form
   - On-site Using Paper Form
   - On-site Using Computerized System
   - On-site via Web, Using Online Form

3. *Set up Systems to Manage*
   - Pre-Registration
   - On-Site Registration
   - Service/Information Centers
   - Daily On-Site Counts (Functions, Guaranteed Events, Sessions)
   - Lead Retrieval (Exhibitor Prospects.)

4. *Accounting Procedures and Controls*
   - How to collect
     - Registration Fees;
     - Ticket Sales;
     - Publication Sales;
   - Consider policy on refunds and cancellations;
   - Procedures for collecting and depositing checks;
   - Procedures for credit card collection.

5. *Refunds of Fees Collected*
   - SFPA does not refund registration fees except where cancellation is due to SFPA action or inaction.

D. Negotiating Agreements and Contracts

It is common practice to have a formal agreement between the venue and the Association; these are known as letters of agreement or hotel contracts.

Only the Association's President is authorized to enter into a contract on behalf of the San Francisco Paralegal Association except that, in the President's absence, the Vice President of Administration *and* the Treasurer are authorized to do so. Any contract must be ratified and approved by a majority vote of the Board of Directors at the next regularly scheduled Board meeting except that where time is of the essence two or more members of the executive committee may ratify any such agreement. The President may delegate the responsibility for a specific contract in writing to the committee chair. Absent that proxy, no other person is authorized to bind SFPA into any contracts.

However, it is the responsibility of the committee chair to negotiate contracts related to their specific event or conference. Negotiations frequently involve a series of inquiries and conversations between the venue and the committee before an agreement can be reached. This process may take several days or weeks. The bottom line in negotiating is that the venue needs to make a profit on your business and, at the same time, you need to pay a reasonable price for the services you are buying. Comparative shopping will help.

What is negotiable? Everything—you will be in a stronger place however if you negotiate from a position of knowledge.

- Know what you want to buy.
- Know what is a competitive price for what you want.
- Know what your budget is.

Also keep in mind that negotiations should be viewed as a collaborative effort among professionals. Neither party should regard their relationship with the other as adversarial.

Definitions

Some commonly used terms you should know are:

- **Room block.** The number and type of rooms the hotel will hold in reserve for a client.
- **Room pickup.** The number of rooms actually used by the client
- **Breakouts.** Commonly used to refer to the number of rooms used for concurrent meeting sessions.
- **Rack rates.** The hotel's official posted rates for sleeping rooms.
- **Group rates.** Also known as net rates, refers to discounted room prices given to clients responsible for bringing in large pieces of business.
- **Flat rate.** Refers to a single group rate for sleeping rooms for all of your business. This rate may not include suites.
- **Sliding scale of group rates.** Discounted sleeping rooms based on the type of guest rooms (single, double, twin, etc.) that will be used.
- **Full American Plan.** Room rate includes three full meals.
- **Modified American Plan.** Room rate includes breakfast and dinner.
- **European Plan.** No meals are included in the room rate.
- **Food and Beverage.** Includes breakfast, refreshments (includes coffee, tea, hot chocolate, juices, soft drinks, Danish and pastries, yogurt, pudding, snacks, etc.), lunch, receptions and buffets, banquets, cash bars, and generally anything ordered from a menu.

Elements of an Agreement

Each hotel or meeting facility has its own contract requirements, and clients have certain requirements too. Most elements of the contract are standard. Following is a list of items commonly used in hotel contracts and agreements:

Identification of venue and Group

- Name of venue and address;
- Name of client and address.;
- Client's contact person and title;
- Name of function or conference title;
- Official dates of meeting, arrival and departure dates plus early and late requirements;
- Anticipated number in attendance;
- Guest room commitment , where applicable;
- The cutoff date indicates the date up to which the venue will hold the room or room block at the group rate. Usually, a hotel will continue to accept reservations at the group rate after the cutoff date on a space available basis; however, it is a negotiable point and it should be clarified in the contract;

Function Information

- A function information sheet or function space assignment sheet will indicate a venue's understanding of your meeting requirements. Venues can only guarantee space for what you agree to, so be sure all your meeting requirements are addressed.
- Meeting room rental charges are negotiable. Charges, if any, should be spelled out in the original agreement. Specify room setup charges, if any, or charges to reset meeting rooms.
- Complimentary space and setup details are important to specify in the agreement to avoid any unexpected charges for room use or setups requested by the group. Complimentary pads, pencils, water, candy dishes, microphones, easels, blackboards, etc., should be included here. Any complimentary items should be noted in the contract.
- The agreement should specify all conference services provided by the venue for which there is a cost to the group, i.e., electricians, security, exhibit table setups, resetting rooms, faxes, etc.
- The venue's sign policy specifies what is and is not permitted and should be noted in the agreement. Usually hotels permit an easel or a special sign holder outside each function room and directional signs at stairways, elevators, and in the lobby.
- A reassignment of function space provision should state that the venue shall not reassign any function space committed to the group without the group's prior approval.

Exhibit Requirements

Not all conferences require exhibit space. If your meeting includes an exposition, the following items should be included in your agreement:

- Assigned exhibit space. Include location and any limits on size, weight, types, or number of exhibits. It's an advantage to have an exhibit area in which food is served or sold, and to have open space between your exhibit and registration area and that of other venue patrons.
- Charges for exhibit space. Exhibit space may be complimentary; it's negotiable.
- Setup and dismantle dates. Indicate the times your group will have access to the space for setup and the date and time for dismantling exhibits. Clearly state the times the exhibit areas may be open and when the area needs to be cleared.

- Utilities available. Include what's available (electricity, lighting, gas, compressed air, water, drains, etc.) and any charges or limitations.

- Storage and security. Include arrangements for storage, storage limitations, access to storage area, and security arrangements.
- Materials. Include specifications for who is responsible for getting materials to the exhibit space.

Pre-conference Shipping
Frequently it is necessary to ship materials to the conference site in advance of the meeting. Your agreement should specify how materials should be packed and marked, to whom materials should be sent, and that such materials will be stored in a secured location.

Meeting Coordinators
The venue should designate a specific person or persons who will handle meeting room setups, menu selections, audiovisual needs, sleeping room requirements, and all other aspects of the group's program. The agreement should have a date by which the designated person(s) will contact the group to review all the program needs.

Food and Beverage

- Specific functions should be listed, such as the number of breakfasts, lunches, dinners, coffee breaks, cocktail receptions, etc., that you plan to hold; the day and date for each function; and the estimated attendance for each function. Hotel policies will determine how many days in advance the group must give a minimum guarantee of the number of people who will attend each function. Hotels usually set for up to five percent over the guaranteed minimum; the specific percentage as directed by the group should be included in the agreement.

- Confirmed prices for all catered meals should be listed. At the minimum, a cap could be put on all food and beverage prices and exact charges could be provided to the group at an acceptable time in advance of the conference (three to nine months).

- State the date by which the group must specify choice of menus, beverages, etc., and confirmed prices.

- Gratuities or service charges required for all food and beverage should be stated.

- Federal, State, and local taxes should be clearly stated.

Americans With Disabilities Act Compliance

Hotels in the United States and its territories are required under the Americans With Disabilities Act (ADA) to make their facilities and services accessible to persons with disabilities. The agreement should state that the hotel shall comply with all public accommodations of the ADA, including TTY for hotel reservations.

Insurance
The facility and the sponsor's group should agree that each will carry adequate liability and other insurance to protect against any claims arising from any activities conducted in the facility during the conference.

Cancellation Policy
All agreements should carry a cancellation policy for the protection of both parties. The following are suggested elements of a cancellation policy:

- **Rights to Cancellation.**

Generally. The agreement will bind each party, and there shall be no right of termination or right to cancel obligations under this agreement except as otherwise provided herein.

Uncontrollable events. The performance of this agreement by either party is subject to acts of God, war, government regulation, disaster, strikes, civil disorder, curtailment of transportation facilities, or other emergency making it inadvisable, illegal, or impossible to perform their obligations under this agreement. Either party may cancel this agreement for any one or more of such reasons upon written notice to the other party.

Advance notice. The group may cancel this agreement without liability provided written notice of cancellation is given to the hotel on or before (date ________).

Construction/renovation. In the event that the venue will be undergoing any construction or renovation during the conference, the hotel shall promptly notify the group, and the group shall have the right to cancel this agreement without liability upon written notice to the hotel if, in the group's reasonable judgment, such construction or renovation may unreasonably affect the use of the facilities or the quality of service to be provided under this agreement.

Management changes.

- **Option 1**: The venue shall promptly notify the group if there is a change in hotel management prior to the conference, and the group shall have the right to cancel this agreement without liability upon written notice to the hotel.

- **Option 2:** Neither change of ownership of the venue nor change of leadership of the group relieves either party of the responsibilities or obligations of this agreement.

- **Without liability.** The phrase "without liability" wherever used in this agreement shall be deemed to include a refund by the venue of all deposits and prepayments made by the group.

- **Cancellation Fee.**

    - **Assessment and calculation.** In the event of any cancellation of this agreement by the group not otherwise permitted under this agreement, the group shall pay a cancellation fee, not a penalty, to the venue.
    - If the venue is able to replace this canceled business, the collected amount will be reimbursed to the group, without interest. If only a percentage of the lost revenue is recovered, the difference between this figure and the fee will be reimbursed to the group. In determining whether or not the lost revenue is recouped, all peak night rooms sold after notice of cancellation is given shall be credited to the group. The terms of this section represent the exclusive remedy for unauthorized cancellation of this agreement by the group.
    - Failure by the venue to provide the space and/or services as agreed shall render the venue liable to the group for all direct, indirect, and consequential damages, expenses, attorney fees, and costs incurred by the group on account of such failure. Exercise by the group of any of its rights of cancellation of this agreement shall not waive or otherwise affect this provision.

- Standard arbitration clause. Any controversy or claim arising out of or relating to this agreement, or the breach thereof, that cannot be acceptably negotiated by both parties shall be settled by arbitration in accordance with the rules of the American Arbitration Association. Judgment on the award rendered by the arbitrator(s) may be entered in any court having jurisdiction thereof.

E. Transportation

The event advertising should include information about transportation to and from the event, including, parking information nearby and public transportation options. SFPA will reimburse speakers for their travel expenses up to a limited amount as defined in the expense reimbursement policy. SFPA does not validate or provide transportation subsidies for conference attendees or vendors.

F. Food and Beverage Requirements

You don't always have much choice when it comes to catering meals. If you're venue is in a full-service hotel, and serving your meals in the banquet rooms, you'll use the hotel's food service staff. If you're eating in a restaurant, clearly outside catering is not an issue. Occasionally venues that merely rent space will nevertheless have preferred—or even required—caterers, but not always. Sometimes you're on your own.

One of the most important things you have to do, before choosing your dishes, is to work your way methodically through the menu. If possible, taste everything. You should taste every appetizer, every soup, every entrée and every dessert to make sure they're fresh and well-prepared, and suitable for the people who will be consuming them. Just as you would do at a restaurant, probe for flexibility. Be sure to find out whether the food-service staff can accommodate requests for special meals.

To pick out your menu and decide how you want the food to be served, it helps to have an understanding of who's in your group. For example, if it's a group of strangers meeting for the first time, it often helps to serve meals buffet-style the first day; that way, socializing and mingling is made easy. Remember, too, to have someone on site who is responsible for managing the food and beverages during the event. The venue will almost certainly provide such a person. That person can be the liaison between you and the hotel when it comes to special meals, if the service slows or to troubleshoot any catering issues that may surface.

Interview a number of caterers before making a choice. Use the same criteria you use when choosing a restaurant: flexibility (a willingness to shift ideas and to listen to the client), proper staffing levels, experience and, of course, expert food preparation. Make sure they have catered events of your size and type before—you don't want to have the caterers learning on the job, so leave tryouts to others. Get references. Give them a realistic budget at the start. Very little irritates a caterer more than being asked to devise a menu without any notion of how much there is to spend. When you have narrowed your choices down to, say, three, start tasting.

By the time you approach a caterer, you should have a pretty fair idea of the agenda, and the number of people who will be at each event. Are you going to have a stand-up reception with canapés and cocktails? A wise caterer will steer you away from certain foods and towards others: not too many messy dips or things that drip—there's nothing worse than an important guest with a red stain of shrimp dip on his shirtfront and a thunderous look on his face. Make sure the food is not too hot, in either sense of the word—you don't want people reaching for a jug of cold water to put out the fire, nor do you want them scorching their fingers. Make sure that what food is suggested can be easily managed with one hand (there'll likely be a glass in the other).

There should also be plenty of beverage options available. Have a selection of mineral waters, juices and soda available with coffees (decaf and regular) and tea. Fruit juices and spiced teas are increasingly popular. Almost all venues will provide carafes of ice water during meetings at no charge and usually also pencils and notepads.

Prices will obviously vary from place to place, but food and beverage costs are a basic part of your cost structure, and you have to be realistic. Here are some rough ballpark numbers, though they will be slightly higher if you use outside caterers, because you must add setup and transportation costs to their estimates:

Continental breakfast: $14 to $15 per person.

Morning and afternoon breaks: $4 to $6 per person.

Hot lunch (not buffet): $30.

A Caution on Costs

If a restaurant quotes a per-person cost for a meal at, say, "$45 ++" (plus tax and plus gratuity), it means that the taxes and gratuities are extra. Sometimes the gratuity is predetermined by the restaurant and can run as high as 20 percent. Many a planner has been unpleasantly surprised when the bill turned out to be much higher than expected. Always ask what is included in the cost. Coffee, tea and sodas are normally included, but bottled waters and specialty coffees are not.

What Won't Work?

- Lots of sloppy sauces.
- Menus with only one entrée. Too much risk of too many people not liking it.
- Substantially pork- or beef-based menus, for reasons of religious taboo.
- Narrowly ethnic cuisine.
- Meat dishes that require precision in cooking. For very large groups, chefs can't cook to order, and to many people, "well done" means "overcooked"; to others, "rare" means "uncooked."
- Fish. It's almost impossible not to overcook flaky fishes in banquet situations, and overcooked fish means dry, tasteless meals that have to be disguised with heavy-handed sauces. Some people are allergic to seafood, especially shellfish.
- Deep frying. Inevitably either greasy or soggy at banquets.
- Cream-based sauces. Too rich, too much risk of congealing.

What Works?

- Lots of choice.
- "Asian fusion." Even banal kitchens can liven dull chicken with a bit of lemon grass or cilantro.
- Pastas. Safe, and endlessly adaptable, especially for vegetarians.
- Fruit salads. No one dislikes fruit.
- Certain meat stews.
- And of course, chicken.

How Much Food?

Knowing how many men and women will be there lets you know how much food to order. Figure that men eat 1.3 times the amount women do, and that women still demand lighter foods. Salad eaters are predominantly women; more men eat red meat than women do. The curious exception is lamb: Most restaurants figure that lamb on the menu will attract more female diners than male ones

G. CLE Credit

In order to obtain CLE credit for the event, you must work with SFPA's CLE Coordinator. He or she can assist you in ensuring that your programs meet the standards set forth by the California State Bar for CLE credit. He or she can also assist you in obtaining the necessary certifications and forms. You should do this as soon as you approach your speakers to ensure that their topic for presentation meet these standards.

7. Event Management

Day of Procedures:

On the day of the conference, all committee members and staff should arrive at least one hour before the event.

Ensure that all registration set up is complete.

Registration at the event is vitally important. This is the your only opportunity to make a first impression. A disorganized registration makes the entire conference appear disorganized. So, it is extremely important that registration be as easy and seemless as possible.

The committee member in charge of registration (the registrar) should meet with the registering staff to discuss procedures for:

- Registration
- Clerks
- Cashiers
- Messages
- Security
- Interpreters
- Information/Service Desks
- Greeters

Materials should be handed out to the registering staff that briefly explains:

- All Working Forms
- Specific Responsibilities
- Filing, Record-Keeping Procedures
- Identification Required to Register
- Fees
- Reference Aids
- Special Policies, Potential Problems
- Courteous Behavior (Welcome First Timers)
- Staff Contact

Registration Packets for attendees should include:

- Program
- Syllabus, if applicable
- Map of the venue showing where sessions will take place
- Event registration data pertinent to the attendees (i.e., which sessions, their locations, etc.)
- Badge(s)
- Event and Lunch Tickets
- Membership Information and Application
- Information about scheduling or speaker changes.

Ensure that Rooms are Set Up Per Specifications

The Site Coordinator should ensure that all rooms are set to specification and confer with venue's event contact on specifics or any issues so that they may be addressed immediately.

Ensure that Food & Beverages Have Been Delivered or Will Be Delivered

The Food & Beverage Coordinator should ensure that any breakfast items have arrived and are properly set up. He or she should be in contact with the catering facility to ensure a timely delivery of any lunch or refreshments.

Ensure that Speakers are Prepared

The Speaker Liaison should ensure that speakers are in place, have arrived and all a/v equipment is set up.

Day-Of Registration Procedure

Standard procedures for registration are as follows:

Three registration tables should be set up:

- Table 1 – Advanced Registration Table
  - This table should have at least two people working at it.
  - The table should have a laptop on it where the staff can check the name of the registrant against the registration list[1]
  - If the registrant is a "will pay at door" staff should direct the registrant to the "Day Of" table;
  - The registrant should be checked off of the list as having arrived and given their conference packet. (The conference packet should have already been created and ready to go, with the registrant's name printed on the outside of the envelope.) If they are paying at the door, the amount of the payment should be noted on the registration list.
  - The registrant should be directed to the breakfast/opening ceremony room

- Table 2 – Day-Of Registrants
  - This table should have two people working at it.
  - The table should have a laptop on it where the staff can check the name of the registrant against membership roles to determine the appropriate fee;
  - This table should have a cash box
  - The staff should enter the registrant's information into the event database (name, address, phone, email, membership status);
  - The fee should be collected
    - The laptop should have wireless connection to accept credit card payment thru SFPA website (paypal); the amount of payment should be noted on the registration list
  - Staff should create a name badge and give badge to registrant
  - Staff should give registrant a conference packet
  - Staff should give registrant a lunch ticket, if applicable.

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[1] *Registration Lists should include*

- A list of attendees formatted (Alphabetical, Industry, Registrant Classification, etc.)
- Payment information
- Membership status

    - The registrant should be directed to the breakfast/opening ceremony room

- Table 3 – speakers and vendors
    - This table should be staffed by the speaker liaison and the vendor liaison and one other person
    - Speakers and vendors should be checked against the registration list and marked off accoridingly
    - Fees should be collected from vendors where applicable
    - The speaker liaison should escort speakers to their appropriate area
    - The vendor liaison should escort vendors to their appropriate area

Cash Handling Procedures

Any payments made in cash on the day-of should be duly noted on the Cash Event Form and the Registration list. Preferred method of payment is credit card or check, but SFPA will accept cash. Only the "Day Of" Registration table will have a cash box.

The cash-box should be funded by the Treasurer, in such a manner as to ensure that it contains adequate funds to make change. Cash opening should be counted by both the Treasurer and the Event Registrar and the Event Cash Form signed. Cash payments should be tracked on the Cash Event Form.

At the end of the day, the Treasurer and Registrar will count the cash, note the check totals, note the charge totals, and balance the cash with the registration list. Both must sign-off on the Event Cash Form. (*See,* Appendix 2.)