##### Society for Research in Psychopathology

 **Local Meeting Organization Handbook**

**Developed by :**

Michael Young (Chicago – 1995)

Suzanne King (Montreal – 1999)

Ann Kring (San Francisco – 2002)

Dick Steffy (Toronto – 2003)

Deanna Barch (Saint Louis – 2004)

Sheri Johnson (Miami – 2005)

Eric Granholm (San Diego – 2006)

Lee Anna Clark & Deborah Stringer (Iowa City – 2007)

Angus MacDonald (Minneapolis – 2009)

Ted Beauchaine (Seattle – 2010)

Christine Hooker (Boston – 2011)

Patricia Deldin (Ann Arbor—2012)

Ann Kring/ Sheri Johnson (Oakland – 2013)

Stewart Shankman (Chicago/Evanston – 2014)

Alex Cohen (New Orleans – 2015)

Jason Schiffman/Jim Gold (Baltimore – 2016)

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| Timeline for Organizing an Annual Meeting |
| 3 -5 Years Before the Meeting |
| 1. **Find the hotel**: 5 years before is NOT too soon!

a. Consider contacting Helms Briscoe – they can do all the leg work in securing a hotel: **Jennifer Watson** *Manager, Global Accounts* **HelmsBriscoe**TEL: 619-303-5307 CEL: 619-917-4666 FAX: 888-436-9137Jwatson@HelmsBriscoe.comb. sign contract (may need to be treasurer who signs)c.Negotiate 2-3 comp (“free”) rooms for invited speakers. Not to be used by Society officersd**.** Negotiations MUST happen before you sign the contract. Otherwise, you have very little leverage (items to consider: cost of space if not free, in-house AV discount from published prices, COFFEE/TEA [$85/gallon in Baltimore can be negotiated down], food at breaks, drinks at Thursday poster session/Saturday social, bartender fees; having ability to replenish ‘on flow’ so you can order low and bump as needed).e. Room negotiations should be in the ball park of 1 free room night for every 40 room nights we stayf. Concessions from hotel at this stage could also include: upgrades to suites (Baltimore got 3), upgrades to better views (Baltimore got 3), discounted room rates for staff (Baltimore got 2 at $40 off hotel rate), complimentary amenities (Baltimore got 3), no penalty for bringing in outside AV (Baltimore used our own computers), internet “lines” in the meeting room (these often cost a lot…free wifi in the lobbies and guest rooms, but big bucks in the meeting room; get at least 4 free lines that you can use for onsite reg Thursday and for the speaker talks on Fri/Sat, free in/out parking for at least 3 maybe more cars)g. The overall budgetary goal has been to “break even” with meeting costs offset by registration. Breaking from this tradition and dipping into SRP surplus could make some things more enjoyable (e.g., more food at breaks) |
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| 1 Year Before (at SRP) |
| 1. **Prepare a short powerpoint presentation (2-3 slides) for business meeting**
2. **Touch base with program chair for your meeting**
3. **Find poster board company** (they will want to know how many poster boards you need, which depends on the size of the available space and the program. Communicate with the hotel event coordinator and the Program Chair) **Find A-V companies** (may be in hotel)
4. **Add basic information about your meeting to the SRP web site**
5. **Coordinate with the Society treasurer to create a budget forecast** using recent budgets from Society conferences held in similarly sized cities (expenses vary widely across locations); be sure to include travel and lodging for invited speakers
* **You’ll need to get estimates for big ticket items (food and beverage, posters. etc.)**
1. **Add Conference to Schizophrenia Research** **mailto:ealibrandi@schizophreniaforum.org**(Stew thinks this address is old). Post something[**http://www.schizophreniaforum.org/contact.asp**](http://www.schizophreniaforum.org/contact.asp)
2. **Look into maybe getting tax exempt status in your state as this could save thousands of dollars on state sales tax.** Stew tried in Illinois but was told that SRP is not the type of organization that could get tax exempt status. In a nutshell, SRP doesn’t count as an ‘educational’ organization as we’re not a school or degree granting institution. We’re also not a charity or religious group. However, every state has different guidelines, so check into yours.
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| 6 Months Before |
| 1. (Treasurer sends out registration forms in e-mail)
2. **Start menu planning**, but if you can negotiate this BEFORE you sign the contract, you’ll get much better pricing. Food is by far the biggest expense. (get a free taste test!)
3. **Work on registration form** **once we know the number of poster submissions**

a. needs to include cost of banquet or reception which must be determined earlyb. The full menu for the banquet (if there is a banquet – in Chicago, it was just a reception) should go out with the request for registration – people should be able to make an informed decision about whether to pay for the banquet.c. Make an estimate for total number attendees at the conference. You will based this on number of poster submissions (but of course extrapolate out to TOTAL number of attendees as not everyone who comes presents a poster of course). This number is essential to figure out how many poster boards to order, of course, but also other items in the registration estimate (number of programs that need to be printed, how much food to order, etc.)1. **Contract for A-V** (get free WiFi if you can, get a hardwired ethernet cable for registration table)
2. **Contract for poster boards** (want 4’ high by 8’ wide). We had 150 posters Thursday and 150 Sunday.
3. **Post local arrangement information on web site**
4. **Begin preparing restaurant and social activities list –** including activities for Sat night reception (if we don’t go back to a banquet). Work with student/associate member committee to plan these social activities.
5. **Update the budget forecast based on current numbers**
6. **Locate a local babysitting company and communicate the info to membership**
7. **Identify a room for parenting needs (e.g., nursing) near the meeting rooms (e.g., staff room). Communicate its availability to membership via listserv early on so that members with parenting needs are aware with enough time such that they can make their travel decisions.**
8. **Work with Secretary, Treasurer, and Web Coordinator to make sure early-bird registration is dated correctly, and shifts over at the appropriate date.**
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| 1 Month Before |
| 1. **Program printing** (get files from program chair). Print more than you need.
2. **Find 6 – 12 (student) helpers** (free registration); arrange always to have more than one student at the registration desk; have 4+ on Thursday evening
3. **E-mail membership** to remind them to reserve their room
4. **Extend deadline for block with hotel if quota not filled**
5. **Buy push pins** (may be available from the posterboard vendor)**.**
6. **Buy name tag materials (this was the cheapest that we found from Office Depot -** [**http://www.officedepot.com/a/products/754421/Avery-Hanging-Name-Badge-Kit-3/**](http://www.officedepot.com/a/products/754421/Avery-Hanging-Name-Badge-Kit-3/)
7. **Get local tourism maps and guides**
8. **Print poster board numbers**
9. **Update budget forecast**
10. **Think about “choreography and props” of each talk** - where speakers will sit, where will microphones will be, will there be a speakers table or not, etc.
11. **Make yourself a “last minute to do list.”**
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| 1 Week Before |
| 1. Finalize numbers for food and beverage
2. Finalize A-V needs with program chairman
3. If you do the Saturday night bingo (this was fun in Chicago!), get gift cards
4. Print restaurant guides (Chicago printed 80 copies - front back – post online as well)
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| Days Before |
| 1. **Print name badges**

-Include lots of blank ones to have on hand for onsite registration-Make sure you print name badges for people that get free registration (e.g., invited speakers, Smadar Levin Winner, your staff, etc).1. **Make any changes to numbers for F&B** (Food & Beverage) with hotel people
2. **Organize name badges with banquet tickets and student social tickets inside.**
3. Maybe have exec board order room service AHEAD of time for Thursday evening board meeting
4. Print bingo cards if you are doing Bingo.
5. Get Wifi password and **TEST** the wifi connection
6. Arrange where the food will be located
7. Arrange for where the location of registration table will be
8. Bring a small printer, extra laptops, markers, powerstrips, extension cords
9. Arrange final walk through (preferably day or two before)
10. Test paypal with web coordinator and/or treasurer
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| Thursday of the Meeting |
| 1. **Set up registration desk and test all internet connections**
2. **Partially finalize numbers for banquet with hotel**
3. **Bring a small printer for last minute registration snafus and other unpredictable printing needs**
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| After the Meeting is Over |
| 1. **Buy yourself a massage**
2. **Finalize the Excel budget file** and submit report
3. **Make changes on this documentation and send a copy to the SRP secretary as well as the next couple of years’ local hosts**
4. **Thank your team**
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| Scheduling the Meeting: Usually Between September – November  |
| **Avoid other Conferences** |
| * Neurosciences: [www.sfn.org](http://www.sfn.org)
* ABCT: [www.abct.org](http://www.aabt.org)
* SPR: [www.sprweb.org](http://www.sprweb.org)
* International Early Psychosis Association: [www.iepa.org.au](http://www.iepa.org.au)
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| **Avoid National Holidays** |
| * Thanksgiving

U.S. (4th Thursday in November) Canada (2nd Monday of October – prefer to avoid weekend before)* Halloween (October 31)
* Veteran’s Day (November 11)
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| **Avoid Religious Holidays** |
| * Web site with dates of Jewish holidays: http://uscj.org/Jewish\_Holidays\_20075396.html

Rosh Hashanah (usually September or October)Yom Kippur |
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| **Weather Issues** |
| * Hurricanes
* Snow
* Tornados
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| **Local Date Issues** |
| * Home football game, pork rind festival….
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| Finding and Booking a Hotel |
| **Choosing a Hotel** |
| * See sample hotel information worksheet in Appendix.
* **See if city convention bureau will find eligible hotels for you; most will bid your needs for free**
* **Contact HelmsBriscoe and they can do this too:** Jennifer Watson *Manager, Global Accounts* HelmsBriscoe TEL: 619-303-5307 CEL: 619-917-4666 FAX: 888-436-9137;**Jwatson@HelmsBriscoe.com**
* Must go **see places yourself** before making final choice
* Negotiate as much as you can (see above) before signing the contract
* **Location location location**
* Avoid undesirable areas
* Should be near restaurants and clubs
* Can you get there from here?! Should be within easy reach of public transportation
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| **Space Needs** |
| **1. Poster session*** Depends on the number of posters (boards are 8’ wide; require 8-10’ between boards)
* 6000 sq ft room = ~45-50 posters
* 4000 sq ft room = ~30-35 posters
* 3000 sq ft room = ~20-25 posters
* Since there is food at the poster sessions, factor in space for a reception area
* Try to make sure the ceiling height is over 12 feet to ensure the room is not claustrophobic
* Make sure there are no weird structural issues in the rooms, such as center pillars or steps
* The number of posters has been increasing over recent years. Discuss estimated number of posters with Program Chair and Executive Board
* In Oakland (2013), AA (2012) & Boston (2011): ~105 posters/session.
* In 2013+, it was decided that the Smadar Levin committee would choose their finalists early enough in the year that only the finalists would need to be scheduled on Thursday. This would then allow for a more even number of posters per session.
* Try and make sure that the people delivering and setting up the poster boards can get to poster session room through a freight elevator or some other easily accessible way. If not, you may have to pay for extra labor for setup (as what happened in Chicago).
* In 2015, we fit 146 posters in 8468 square feet. There was limited room for passage between posters. . Doable, but far from optimal.
* In 2016 Baltimore, 150 posters in 6168 square feet. A little cramped but OK because we were able to use a big attached hallway for food setup.

**2. Meeting rooms*** Best to get the previous year contract, as it will have many details spelled out
* To accommodate 200-250 people classroom style (tables, pens, paper, water)
* Check out dimensions of the room – not too long, not too wide, ceiling high enough
* Note: Meeting room and poster room could be same room but poster boards must be moved out by poster board company
* Is there a convenient area for food and coffee service outside of meeting room? (Do not have too near because loudness of coffee hour can be problematic for talks that have not yet ended).
* Is there a good registration area (where you can get a hardwired Ethernet connection)?
* Need to have a board room for executive board meetings
* 2016 Baltimore did a mix of classroom and theatre (just chairs) to maximize space
* Work with Program Committee early to determine if you will have triple tracks and need 3 rooms

**3. Receptions and Banquet Rooms*** Room for reception instead of banquet – 225-275 people with bar
* On years where this is a banquet, room for banquet with roomy cocktail area nearby and large bar (about 100 people)
* For Social Reception/Awards, bear in mind that this event serves 2 functions: honoring awardees and providing an opportunity to socialize, with the primary function being to honor awardees. As such, make sure the space is conducive to speech-making and make sure A/V needs are met.
* Have everything ready to go so that awards can start promptly.
* Check in with people well in advance to see if a slide show is required and contract for that as well if needed.

**4. Student Social*** In AA, Oakland, and Chicago had at local brewery—make sure not too roomy so it allows, too much space between natural university based groups that form… Students strongly prefer OFFSITE social (i.e., not in hotel). Same time as members business meeting

**5. Guest Rooms*** Available guest rooms: need to block at least 150 rooms per night (2016 Baltimore booked 160 rooms per night, with 150 rooms “picked up”).
* Make sure you understand the Society’s liability if you do not meet the number of blocked rooms. Some hotels will hold you responsible if you do not fill your block. 2016 Baltimore needed to clear 80% of booked rooms to avoid penalty
* You can usually negotiate how long these are held. You may or may not be able to add to the room block later. Do find out what arrangements could be made for neighboring hotels, as blocks at adjacent hotels were needed for Oakland and Miami.
* Number of attendees and desirability of the conference hotel can fluctuate. For example, the conference rate at the Hyatt Boston (2011) was considerably less than surrounding hotels, so the blocked rooms sold out quickly. We reserved 125 per night for the conference period and could have filled 150 per night. However, if the conference rate is equivalent or higher than surrounding hotels, many people will choose to stay at a cheaper place.
* CANCELLATIONS – In 2015, We originally reserved 165 rooms, and these were filled. However, nearly 20 of the rooms were cancelled within a few days of the conference. Half of these rooms involved individuals reserving multiple rooms. This was an issue because rooms in NO were scarce (so the rooms might have been used by others) and because 150 rooms/night were required to get 3 comped rooms. Hence, SRP had to pay for 1 of the "comped" rooms).
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| **Costs** |
| **1. EVERYTHING IS NEGOTIABLE … if you haven’t signed the contract****2. Balancing different kinds of costs at different hotels:** * 1. Make up a form to compare costs at different hotels when charges for meeting rooms and F&B (Food & Beverage) (+ other costs) are considered together.
* Food & Beverage versus meeting room charge versus number of room nights
* If do all F&B and banquet at hotel, will meeting rooms be free/reduced rate?
* Get menus with prices to compare costs (costs vary widely!)
* There will be a minimum cost for F&B in contract (this should allow for lower meeting room rate)
* A-V costs if use company within hotel
	+ - There are pros and cons to using the hotel AV
		- Pro: they are onsite in case of AV emergency
		- Con: The hotel may tack on their service charge to AV services (in San Diego, we saved the hotel service charge of 20% by having the in-house AV company bill us directly, rather than through the hotel billing).
		- In AA we did a hybrid: brought our own laptops and used the rest of the Michigan leagues equipment (mic’s etc).. saved lots of money but a bit stressful for my students to run around and be sure computers worked.
		- 2016 Baltimore similar experience to AA, brought our own computers/relied on speakers to bring theirs, and didn’t pay for in-room AV support ($100/hour)

 * If there is to be a box lunch event , this can be used as a bargaining chip (but a box lunch can break the budget if don’t find outside sponsorship)
* How much is each hotel’s service charge?
* Try to negotiate the F&B prices and service charge rate frozen for the year you sign the contract
	1. ***What is the hotel’s cancellation policy?*** (What happens if you have to bail out…)
* Know how long in advance you can cancel
* Could be sliding scale – example:
* January $16,500
* August $32,000
* October $55,000
* Could be fixed amount (in 2002 in San Francisco: it was a fixed $50,000 penalty)
* If conference insurance is purchased, it should cover if this is due to a disaster. Check with SRP secretary
* Can *negotiate to come back to that hotel a few years later in the event of a cancellation*

**3. Guest rooms****(a) *How much do they cost?**** Need to balance between a hotel with rooms that are too expensive (the members and students won’t stay at your hotel but will find some place cheaper), or too cheap (they won’t WANT to stay there!)
* *What should the rate be?*
* Location dependent—look at recent budgets from similarly sized cities
* In 2011, the rates varied between $199 and $245 in Boston. The rate of $199 was
* In 2012, the rate for a single was $161, Ann Arbor
* In 2013, rate for single was $149 in Oakland
* In 2014, single rate was $159 in Chicago
* In 2015, single rate was ~$195
* In 2016, single rate was $189 plus tax in Baltimore
* The conference rate should be LESS THAN regular rate
* Some hotels will offer a ‘conference rate’ that is more than their regular rate because they are holding rooms for you that might not be reserved – negotiate a lower-than-regular rate because we guarantee a certain number of room nights.
* Check competitive rates through web sites (expedia, travelocity…)
* Make sure wifi is included in rooms
* “Resort fee”?!?
* Some hotels asking for extra fees for services like using the gym, using internet, turning on the phone… watch out for this!
	+ 1. ***Blocking guest rooms***
* The hotel will reserve a block of rooms for the meeting, meaning that they will not give them out to people not associated with the SRP meeting
* GUESS WELL
	+ if you UNDERESTIMATE the number of registrants and block too few rooms, some attendees won’t be able to get rooms with the special rate
	+ If you OVERESTIMATE, SRP may be liable for the number of rooms blocked in the contract – in San Diego, the number of rooms in the block were contracted
* You might consider specifying a percentage of double rooms
* In 2006 – we ran out of doubles in the block and when people called to reserve a room, there were only kings
* The number of room nights varies widely with different contracts
* In Toronto: 160 room nights
* In San Francisco: 300 room nights (90% = 270)
* In Montreal: 100 rooms for each of the 3 nights
* In San Diego: 100 rooms for each of the 3 nights
* In Seattle: 100 rooms for each of the 3 nights; could have been at least 125
* In Boston: 125 per night. We could have done 150
* In Ann Arbor, we blocked a 150 but didn’t have a minimum. We used 143 rooms.
* In Oakland, 105 rooms for each of the 3 nights; we needed more and got them
* In Chicago (a likely outlier), 150 rooms in the main hotel and 45 other rooms in two other hotels (195 total each of three nights). We needed a lot more but were unable to get them.
* In New Orleans (2015), 165 rooms in the hotel were blocked, though 20 were cancelled (see above for note).
* In Baltimore (2016), 168 were blocked, up to 166 were reserved, but around 10 (depending on night) cancelled so we ended up with about 152 per night.
* Negotiate a cutoff date with the hotel after which any unreserved rooms will be released to the hotel and can be reserved at the regular rate by anyone. (2016 Baltimore was 1 month before event…pushing it closer to event is better)
* The number of room nights blocked is an important bargaining chip for the contract in terms of the cost of meeting rooms
* May get meeting rooms free (but watch for inflated F&B costs)
* In Montreal: main meeting room cost $1,200 per day for Friday and Saturday – no other rooms charges
* Additional rental fees would have been charged if 81% of room nights blocked were not used:
* If 80% of room nights used, additional meeting room rental charge of $600
* Sliding scale included fees for 70%, 60%, 50%, 40% and an additional $2,100 if 30% or fewer room nights used.
* In San Diego, meeting room costs were negotiated down even after the contract was signed – use the potential F&B costs to negotiate room prices (remember that service charges also apply to meeting rooms -20% +tax in SD)
* In Baltimore (2016), meeting rooms were freeDeal for free/complementary rooms (Use for invited speakers)
* In Montreal, Ann Arbor and San Diego, the hotel offered 1 free room night for every 50 paid room nights (i.e., if 100 rooms reserved each night, 2 free rooms provided); In Oakland, Chicago, and Baltimore it was 1 free for every 40 paid room nights.
* Internet Access is important. It’s best to negotiate as part of the room rate. Should also negotiate for free internet access in all hotel common areas and meeting rooms. NOTE: meeting rooms rarely have free internet so do not get if it is expensive (hotel would not budge on this one in Baltimore, 2016, but we negotiated for 3 ‘lines’ within meeting rooms). Consider making a sign explaining why no wifi in meeting room as many people expected it.

**4. Other costs to consider*** Is there a hotel shuttle from the airport?
* Parking?
* Fitness room?
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| **Contracting with the Hotel** |
| **1. SRP treasurer may have history of previous contracts for comparison*** Know names of previous SRP meeting hotels (see meetinglist.doc)

**2. Deposits*** Rarely required at this point

**3. Food & Beverage** * Start with the food and beverage contract from the previous year; it will give you a great estimate of the details to specify.
* TRY to include in contract the stipulation that the prices on the current menus (and service charge fees) are locked in and will be used at the time of the meeting – get a copy of the menu. In Oakland, paid 2011 prices plus 3% for the 2013 meeting
* Remember that the F&B amount you contract for DOES NOT include service charges and fees
* Tax and Service charges on hotel services are variable, but can be quite high. There was a 36% charge on all food and beverage in New Orleans in 2015.
	+ Try to keep the “left-over” food and beverages out the whole conference. People loved that. But, make sure old coffee is gone after lunch, otherwise people will come salivating for coffee and you won’t have enough to satisfy them.
	+ Arrange to have food and beverage at the Executive meetings.
	+ Try to provide vegetarian options for all meals.

**4. Who signs the contract?*** The hotel may require that it be the treasurer
* Good idea that the treasurer approve the deal first
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| **Details to Work Out with the Hotel after Initial Contract** |
| **Monitoring Hotel Guest Room Registrations** |
| **1. Start 3 months before (June-July)*** Send out e-mails to membership to remind them to reserve a room
* Send the secretary local information for the website

**2. About 1.5 months before (early August)*** Start communicating frequently with hotel as deadline for blocked rooms approaches (mid-September)
* Can ask the hotel to send updates via email
* Consider making the SRP publicized “official deadline” 1 week prior to the actual deadline at the hotel.
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| **Meeting Rooms** |
| **1. What’s needed when?** * The hotel will eventually provide you with a stack of BEOs (Banquet Event Orders), or prospectus sheets summarizing each event down to the nth detail

**2. For how many people?*** Classroom style works best (with tables) – with dual track sessions being the norm, you will need one room that holds 250-300 and another for around 150
* You can (and likely will) do a combination of classroom and theatre style. Classroom style in front – theatre in back.
* In Baltimore (2016) we needed close to 500 chairs for the plenaries and 250 for break outs

**3. What do you need in the rooms?** * Water? Hard candy? Podium? Audio-visual?
* Arrange to have glasses and pitchers of water rather than bottled water; it’s both cheaper and “greener”
* Make sure that there are enough screens/projectors so that everyone can see the science!
* See F&B section below for details
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| **Registration Area** |
| **1. Setup & times*** Available Thursday 4:00 or 5:00 – 9:00
* Start setup 30 minutes before; open at least 10 minutes before 5:00 because board members will want their ids before the board meeting begins
* Things to hand out
* Printed name tags & plastic holders (don’t assemble the lanyards – takes too much time and they get tangled; let each person do own)
* Blank name tags and felt pen for onsite registrants OR
* Use a label maker to create name tags onsite
* Notes to members who have requests from students to visit their poster (should be e-mailed in advance – this is a reminder)
* Meeting programs
* Banquet tickets (prepare ahead by putting in back of nametag)
* Student social tickets (prepare ahead by putting in back of nametag)
* Restaurant lists – not for all; just put a few out; put this on web
* Tourist stuff like maps and guidebooks; fitness info.
* Don’t need registration, last 3 hours of Friday or Saturday, or Sunday morning.

**2. To have on hand*** Phone & walkie- talkie to reach hotel staff if needed (or use cells – get #s)
* List of registrants including banquet requests
* Fee list for onsite registration
* Laptop computers (plural) with internet access so onsite registrants can log in to pay via paypal. In Chicago, we needed several as the registration line was very long.
* Make sure that the internet access is secure or Paypal will not work for registration
* Pens
* Keep city street finder on hand to help out people looking for a specific address
* Masking tape, scissors, paper clips, stapler, paper…
* Keep a list of names of those who register onsite in case paypal not working. It’s usually a good idea to keep a record of onset registrants even if Paypal is working.
* Printer
* Extension cord
* Powerstrip

**3. Signage allowed?*** If it’s not obvious where registration is, provide for signage to direct people to registration and meeting rooms – check with hotel about what kind and where signage is allowed

**4. Meeting notice board*** Ask the hotel to make sure SRP events are on the electronic message board
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| **Food and Beverage** |
| **1. Remember all F&B carries an additional service charge and taxes*** Use the possible F&B costs to negotiate meeting room prices
* The more you spend here, the more you can negotiate for discounts
* Service charges and taxes also apply to meeting room rental fees.
* See above for when you should negotiate this (before signing contract)
* TIP: Hotels charge the service charge and then they tax it.
* So, if the service charge is 20%, and you spend $100, they tax $120.
* The service charge was 36% in New Orleans, 2015.

**2. In last weeks before conference, go over BEOs (also called prospectus…)*** Try to sign the BEO as late as possible because it gives you the chance to change the numbers until the last minute – in Oakland, we did not have a final BEO until the Thursday of the conference
* A BEO is a list of every event and all of the specifications for each one. This document locks in the numbers of people for each (except maybe the banquet – can add to number after registration). At Iowa, we changed this from Friday morning to Friday afternoon because of heavier onsite registration– every place will be different. Just ask in advance to see what kind of flexibility you may have.
* Check these carefully as you must sign each page and will be responsible for paying for everything on there. Double check against details.doc.
* Better to guess low than high for number of people to be fed (easier to add people to an event than to take away).

**3. In general, order F&B for about 50-75% of people expected to be present (less for Sunday breakfast and maybe less for other breakfasts too)*** Be careful-the hotel will try to do an “automatic refresh” or a “head count”: make sure to tell them to ONLY put out enough food for the contracted number of people and to check with your first before putting out extra food
* “head count” or “automatic refresh” means they will count how many people they see eating and charge you for that number!
* Remember that not everyone will attend every event/meal, so don’t panic!
* We ordered for 220 at Ann Arbor (registration: 310) and had way more than enough.
* We ordered for 180 in Oakland (280 registered). Had enough ordered except for Sunday breakfast.
* In Chicago, we varied our order depending on the meal (e.g., less for breakfast, more for Thursday night poster session. We used 66% of expected attendees. However, we ended up needing more food. Luckily, the hotel was able to accommodate this change on the fly and give us more food. They just increased the cost of F&B in our final bill (which wasn’t a problem).
* In Chicago, people were big fans of healthy food options. Thus, for snacks/breakfast, have protein or vegetable options and not just heavy carbs (e.g., muffins, etc). Protein bars were a big hit!
* We ordered food and beverage for 200 (with registration around 400) and had food leftover at most meals.
* In Baltimore (2016) we ordered for 200, but the hotel was antsy about this because they knew more than 200 people were coming. We held our ground, and didn’t run out of food. Although we did at times run out of coffee, so it’s good to have the hotel willing to offer more last minute.
* In Baltimore (2016) to keep costs down, we did some things “on consumption” like chips and yogurt. We put out 50 or so and kept on eye on how many we had left in case we needed to add more, and we were refunded for what we didn’t use.
* You can always add F&B at an a la carte price (sometimes they call this ‘on consumption’, e.g., coffee, number of sodas, etc.)

**4. Thursday poster session*** Provide food for the poster session: “heavy d’oerves”; many people won’t have time for dinner before the session and having “just munchies” will mean that people will bail early to go eat. Better to have enough to keep them at the poster session.
* This has to be balanced, however, with your overall budget.
* Cash bar

**5. Continental breakfasts (Friday, Saturday, Sunday)*** Add variety to daily menus; fresh fruit and eggs is always good.
* People consistently said in Chicago/Evanston that they really appreciated NOT having just muffins, and other heavy carbs as it allowed them to be more alert throughout the day (which is consistent with research – see Holt, Delargy, Lawton, & Blundell, 1999-Int J Food Sci Nutr).

**6. Morning and afternoon breaks*** Coffee (regular and decaf) and tea should be available (ideal if all day)
* Soft drinks (or “pop” as they say in Chicago) are a nice touch in afternoon
* Include additional food at breaks
* In Oakland, we received a complaint about offering nuts (allergy concerns)

**7. The box lunch** - optional* Depends on program – is there a lunch time event?
* It needs to be worked into budget (can be expensive) and may need to be sponsored outside of registration
* Let people know if there are a lot available or only a few
* San Diego: We made the mistake of saying there were only a few available and then ordering for 90% of the attendees. We assumed people would grab-and-go, but this is not the case. There were 50 left over!
* Iowa: We asked people to sign up for the lunch at registration. There was no extra charge, but that way we know how many to order and people felt some obligation either to stay for the lunch or not depending on what they had signed up for. We added a few extra so people could change their mind and attend, and we had only a handful left over.
* In AA used sign up genius for lunch and it worked well.

**8. Student Social*** Expect anywhere from 50 to 100 (Chicago had WAY more than this)
* Starting with Ann Arbor and continuing in Oakland, went to a brewing co out of hotel. Much cheaper and students enjoyed it. Develop ice breaker games for prizes and additional free drink tickets—works well. Lots of students went (> 80) and stayed so long.
* Schedule to overlap with business meeting so students have something to do during the meeting
* Open bar – arrange for drink tickets to be given with student registration (in name tags)
	+ Ann Arbor and Oakland—we provided 1 ticket before and surprised those that went with a second one. Be sure to only provide choices that are <$7.00. The wines ended up being $10/glass!
	+ Note that if we were to provide drinks at our conference venue, this could have insurance repercussions. You would have to work with the secretary on this as it could void insurance.
* Provide light food
* Consider tray passing more expensive hors d’oerves – may be less expensive than ordering a standard cheese or vegetable tray, and it looks fancier
* AA: We ordered too much food but since it was at the pub, the whole thing (food and drinks ~ $1800); Was even less in Oakland with plenty of food

**9. Reception/Cocktail hour*** If no banquet, expect approximately –225-275 (order for 150-175)
* Have hot hors d’oeuvres; don’t overdo the food (folks will go out to dinner)
* AA: Added a special pianist—seemed like people enjoyed.
* Chicago had a Spotify playlist that we played through a sound system.
* Have all A/V contracted and set up so speeches can be delivered.
* Make sure space is conducive to honoring awardees.

**10. Banquet (As of 2014; the banquet has been suspended/discontinued)*** Should be scheduled Saturday (Friday is Jewish Sabbath)
* Work out menu at least 6-8 months in advance
* You can schedule a tasting with the hotel
* If you locked in prices or F&B in the year you signed the contract, get a new menu – some items may no longer be available
* Cost needs to be covered by ticket (i.e., the banquet needs to pay for itself)
* Boston: The cost of the banquet was about $100 per person and we were afraid (with good reason) that people would not pay that price, especially when there was good available for cheaper right around the hotel. In this case, we charged $75 for members and $60 for students and covered the cost from other areas of the conference budget.
* The hotel needs the final number before the beginning of the conference (at least this was the case in Boston). However, many people like to wait to decide until they register (and see who else is going). It’s a good idea to start advertising the banquet early on so that you have a final number before the conference.
* In AA our budget, we were over by $770. We charged $35 for students and $55 for full members. The meals cost $29-35/person. However, appetizers were very expensive but great.
* In AA, we did not let them register for Banquet at the conference since we needed a final count the week before. I recommend this but letting people know in advance.
* Something to consider: Go to a restaurant in walking distance instead of the hotel for banquet. Might be cheaper and food will probably be better.
* Cost of ticket and complete menu (with choices) should be available at time registration forms go out to the membership
* Should include meal choices including vegetarian
* Leave place on registration form for people to write in special needs such as kosher
* Keep cash bar open during banquet (AND supply wine at tables as part of banquet ticket)
* You can bring wine in and pay a corkage fee but likely more than hotel house wine
	+ Minneapolis – Radisson wanted an $18 corkage fee.
* If do provide wine through hotel, tell hotel how many bottles maximum are included in deal
	+ After reading this, renegotiated wine in AA and got them to do cheaper wine ($21 compared with $36/bottle)
	+ In Oakland, was $18/bottle for the house wine. It was cheaper to provide one bottle of red and one of white per table than to provide drink coupons
* If there is to be a banquet, coordinate with Program Chair what programming should occur during banquet (e.g, Zubin, Mentor Award, Early Career Award speak; announce Smadar-Levin winner.
* Is A-V needed? Ask program chair
* May want to consider a riser and a podium if require AV for speeches, etc.
* have tickets for Smadar-Levin runners-up and/or winner (3 tickets total)
* **The S-L committee chair prepares the certificate for the winners – be sure that s/he knows that**. At both San Diego and Iowa, we prepared the certificates with a blank space for the name for the presentation at the banquet, and then had the winners’ names calligraphied on the certificate afterwards. For a plaque, they have to be engraved after the meeting.
* BANQUET HISTORY
* In 2003 there was discussion of ‘revamping’ the banquet to make it more enjoyable & more affordable: Could the cost be included in the registration fee so that everyone attends, including students?
* Could the meal be followed by entertainment such as music and dancing?
* This would give members and students chance to have fun together but only if enough people attend
* There was some mention of moving the banquet to a lunchtime buffet to keep cost down
* Down side is that it packs a long day – people need time to go out and walk around at lunch time before returning to meetings
* The momentum for partying together is lost if done at lunch
* In Evanston in 2014, reception instead of banquet to honor award winners. This was MUCH cheaper than a banquet and was well-received.
* Same in New Orleans 2015, reception with cash bar and appetizers.

**10. Board Meetings*** Thursday: order coffee, snacks (we provided sandwiches the last 2 years)
* Sunday morning: order breakfast (for about 15 people).
* In 2015, there was recommendation of serving meals during the executive meetings.
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| **Advertising the Meeting** |
| **Note** |
| SRP has tradition of keeping organization and meeting relatively small: therefore no mass advertising to recruit new members is usually done. We have been trying to do systematic outreach to relevant European conferences. |
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| **What to Tell’Em and When** |
| **1. Be sure to say not only dates of meeting, but start and end times (for people booking flights)****2. E-mails to the membership*** + 3-6 months before meeting with link to registration live on website
	+ Must organize with treasurer and program chair
	+ Include banquet menu choices (unless you go with buffet)
	+ About 1 month before to remind membership about hotel registration – work around deadline for blocked hotel rooms
	+ Registration fees should cover the cost of the conference (A-V, F&B, etc), so it is helpful to know how much money you have in the bank (i.e. paid registrations) \*before\* you need to make the final Food & Beverage decisions (which is usually 3 days before the conference). It is difficult to estimate how many onsite registrations you will have, so it makes life easier for the local host if everyone registers ahead of time. In Oakland, we suggested that we charge more for registration at the conference than if a person registered a week ahead of time. This was approved for full members, but not for students or associate members. Work with the Secretary and others to make announcements and encourage people to register prior to the meeting.
	+ Work with the board to identify the appropriate registration fees that will cover the cost of the conference. We needed to increase registration fees by ~%50 to cover the cost of the Boston conference. There has been discussion about ways to handle the different costs across cities. Talk to the Board about the current thinking on this.
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| **The Web Site** |
| **1. Where and how administered*** Now administered through SRP (now Shaun Eack) administrator

**2. Contents*** Send files to SRP secretary to upload to website (or do yourself)
* Basic meeting information
* Dates of meeting including start and end times (i.e., Thursday evening until Sunday 11:00/noon?)
* Location of meeting including address / phone number of hotel
* Meeting registration
* Hotel reservation information
* Travel options (by air, train, bus, car)
* Map
* Driving instructions
* From train/bus station, major highways, etc.
* How to get from airport
* How much a typical cab ride/limo/shuttle would cost
* Costs of shuttle (Hotel shuttle? If so, how to get)
* Phone number(s) of shuttle company/ies
* Public transportation? If so, directions/instructions to use
* Driving instructions from airport
* Information for presenters
* Oral Presentations:
* What A-V will be available?
* A-V tech people to help if problems? Cost?
* PowerPoint is the norm; check on Mac/Keynote or web-based platforms
* Can presenters bring their own computer?
* Alert presenters to provide program chair with PowerPoint presentation in advance; check with AV about when they need thse if using hotel computer
* Poster Presentations:
* Size and orientation of boards
* Velcro or push pins? Who provides? SRP? Poster company?
* Times to install and remove posters
* Information on nearby business centers (photocopies, overheads, poster printing, etc.)
* Tourist info
* Links to tourist sites, web cams, etc.
* Likely temperatures and weather
* Major events happening during the meeting
* Ex.: concerts/ shows requiring advanced ticket reservation
* Local tipping customs if different from the norm
* List of movies and books set in your city for sightseeing tours
* Recommended restaurants (post in advance so people can make reservations)
* Program
* Including time and place of registration
* Names and location of meeting rooms
* Map of hotel facilities
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| **The Budget** |
| **Whose Responsibility?** |
| * Easiest for the local arrangement team to make sure that conference breaks even
* There is a small cushion in SRP account if problems arise
* Work with treasurer and program chair to account for all costs and credits
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| **Elements of the Budget** |
| 1. **See summaries of 2012 and 2013 budgets in appendix**
2. **Costs of previous meetings**
3. **Ask current treasurer**
4. **Useful Excel files from previous meetings (available from treasurer or prior local hosts)**

**5. Costs*** **Meeting rooms**
	+ San Diego: Costs for the meeting rooms can be renegotiated up to days before the conference! If you decide to increase the room block, you can pre-negotiate that the cost of rooms will be less. We negotiated thousands off the cost of rooms, sometimes using the logic that we need more rooms, so the whole lot should cost less (I know it’s somewhat faulty). One room was initially $3000, negotiated down to $1500 (reason: initial room to small, new room too pricey, SRP cheap and small), then $900 (reason: more people coming, more F&B will be ordered, SRP cheap and small), and finally, $500 (reason: LOTS more people coming, LOTS more F&B will be ordered, SRP cheap and small)!
	+ Iowa – Rooms were free if we bought certain amount of F&B, which was no problem.
	+ Chicago – we got charged a room fee.
	+ New Orleans – no room fees if F & B minimum is met.
	+ In Baltimore (2016) no room fee.
* **Food and Beverage**
* Prices are generally non-negotiable once you sign the contract – try to lock in rates when you sign the contract and include this provision in the contract
* **Audio-visual**
* Order both Macs and PC laptops for presentations – get a “switcher” so people can easily switch formats between talks. In Baltimore (2016) we used our own computers and also asked if presenters wanted to use theirs to save money.
* If the AV company is onsite, ask if a technician is necessary in the room for AV emergencies
* If the AV company is onsite but an independent contractor, the hotel may try to charge the service fee for hotel services! Try to get the AV company to bill you directly, because if you are billed for AV through the hotel, it will cost an extra 20%.
* ASK FOR A DISCOUNT
	+ San Diego: We asked, and got 33% (~$1700!) off the initially contracted items.
	+ Be VERY careful about ‘webinar’ technologies. Band width restrictions created big problems in Seattle.
	+ Make sure that there are mikes with stands for the audience (it is awkward to run the mikes up and down the aisles)
	+ Better to use an A-V vendor that has worked with the hotel rather than finding someone on your own.
	+ Arrange for standing mics for questions
	+ Arrange for mic for social awards reception
* **Poster boards**
* ALWAYS more expensive than you think they will be

(AA: even this is negotiable. Originally, $75 each, we got them for $60 each FOR EACH day)* Ask if they provide pushpins
* May be cheaper if they can be stored at the hotel from Thursday until Sunday am. In Chicago, we saved a LOT on labor by doing this.
* **Program printing**
	+ In 2013, the board recommended that we only print a program without the abstracts. Abstracts are available online, and all posters can be uploaded after the conference.
	+ In Oakland, Fedex prices were 25% of their typical prices if we printed in bulk with one month advance.
	+ The program chair will provide the basic program, but you should select a local photograph for the cover
* **Stationary, name tags, etc**
	+ Oakland: We ordered online – the name tag holders came in bulk (250) from a different place than the inserts (300)
* **Banquet**: must pay for itself
* **Smadar Levin award winners from this and last year**
* This year’s winner’s banquet
* Last year’s winner’s registration & hotel
* **Invited speakers from out of town incl. Zubin award winner**
* Honoraria for invited speakers: $1500
* There are guidelines for program chair regarding honoraria
* Hotel and travel costs for invited speakers (use comp’d rooms from hotel for guest speakers)
* Program chair should make clear to speaker what conditions (coach, not 1st class, reasonable cost airfare (spend a Saturday night?)
* See “who gets what” on the handbooks website for a list of perks, but key speakers do get invited to the banquet

**6. Revenues*** Registrations
* AA: 290 pre-registrants; ~315 total. Oakland: 237 pre- and 46 onsite
* # of registrations: varies from 200 - 3225 (averages about 250)
* On site registrations hover around 35-50 people
* See numbers in appendix
* Advertising in program
* Sell ads to local book store, text book publishers, etc.
* In past, have sold for $200 (quarter page), $300 (half-page), and $500 (full page)
* University conference organization grant

AA: $2600 for lunch and for general support.New Orleans 2015: Louisiana State University contributed $2000 for the “Faces of the future” Luncheon. * In the past, unrestricted educational grants from pharmaceutical companies obtained by members of the Development Committee – not done for past several years.
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| **Liaison with the Treasurer** |
| * Usually local person pays using the SRP credit card (ask the treasurer)
* Monitoring the number of registrations
* Preparing name badges
* Get list of registrants from treasurer – paypal downloads
* Estimate 35-50 on-site registrants and hope for the best.
* Monitoring banquet choices
* The hotel likes to have an idea of how many chicken, fish, vegetarian, etc. as early as possible (but number is often finalized Friday at noon)
* Arrange to get award plaques ordered.
* Who staffs the registration desk?
* Local host student-power is the norm
* People whose membership will be voted on in Thursday executive board meeting can register at member rate if they pay the dues – amount to same price or close.
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| **The Scientific Program** |
| **Liaison with the Program Chair** |
| **1. Start and end times in meeting rooms** * Don’t start too early if possible (8:00 a.m. Friday is rather early for people arriving late the night before)
* Don’t end too late: beware of evening weddings and receptions… Check with hotel

**2. How many posters will there be at each session?*** Plan out poster room on paper leaving about 8-10 foot aisles between poster boards (see space needs)
* May need to consider using single sided boards (cheaper than double sided) against the walls
* If space is restricted, consider 4’x6’ boards (instead of 4’x8’)

**3. Audio-visual requirements for speakers*** Coordinate with program committee for speaker needs
* Arrange time and means for getting speakers’ PowerPoint presentations on computer in time
* Have all files on desktop by name.
	+ - Make sure that there is a switch box for those who want to use own computer
			* San Diego: Best NOT to let people hook up their own computers. Things went smoothly for us in terms of time management because presenters were asked to upload their presentations to the computers already hooked up via a USB drive or disk.
		- Have phone extension (walkie-talkie is better) for A-V people in event of crisis.
* Ideally, have an A/V person in the rooms ALL DAY.
* Exchange cell phone numbers with all key people

**4. Arrange for welcoming remarks*** + - Local host and SRP president
		- Printing of the program: locally is more efficient (see notes under budget)
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| **Social and Leisure** |
| 1. **Preparing a guide: post online, email people it is available**

Area lunch spots* Give small number of suggestions within walking distance of meeting
* Describe type of food and price
* Dinner suggestions
* Give small number of recommendations
* Give address and estimated distance from meeting
* Include phone number for reservations
* Neighborhood map to help people find your lunch spots (available from hotel)
* Night spots (especially jazz & dancing!)
* Tourism suggestions
* Public transportation (metro map…)
* Running trails
* Mental health awareness morning walk

**2. Have some tourist guides on hand at registration** |
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| **Before the Meeting: Preparation Checklist** |
| * Name badges & checklists of registrants
	+ Treasurer provides Paypal list of names of people who have registered, and their ‘affiliation’ to be put on name badge. Word has good mail merge programs for creating these on your printer.
	+ List of members to check member status if needed
	+ Don’t forget about the invited speakers and Zubin award winner
	+ Also, don’t forget about printing name badges for helpers
* Programs
* Restaurant list
* Banquet tickets
* Poster numbers to put on boards **🡨this is easy to forget, so don’t !**
* Put poster numbers on board early on Sunday before Board Meeting in case board members have a poste**r**
* CE materials (2013- NOT LIKELY TO HAPPEN AT FUTURE MEETINGS)
	+ Sign in/out sheets
	+ CE certificates
	+ Signs (ex: A-F pre-registrations, on-site registration, etc.)
* Extra pens (can ask the hotel for some)
* Optional: “Welcome” slide show(s) to play as people arrive in morning and after lunch
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| **During the Meeting** |
| **Staffing** |
| * 6-10 helpers are usually enough to cover the meeting and be able to trade off in order to attend some sessions
	+ Helpers get free registration
	+ We assign 1-2 students per room. Highly recommend because things will go wrong. Even if it doesn’t it reassures speaker to know someone is there. We gave helper students yellow name tags so the speakers could identify.
* Registration desk
	+ Thursday evening: at least 4 people
	+ Friday morning: 4 people (in 2015, we got by with 2 people)
	+ Friday afternoon through Saturday noon: 2 people sufficient; good to have at least 2, in case an errand needs running (+ they keep each other company)
	+ Consider ending at 3:00—let the students get in more science
	+ Think about where all the stuff goes at the end of the night. Get a storage room from hotel ideally.
* Signage
	+ If the directions to the meeting rooms are not well marked, ask student volunteers to hang large, clear homemade signs.
* Audio-visual
	+ Assign one helper at a time to be available near podium to help with any A-V needs (should have walkie-talkie/cell phone to call for help)
* Lighting/room temperature
	+ Keep one helper near light switches to adjust lighting if necessary
	+ Provide thermometer to monitor temperature in room and be able to adjust if too hot or cold.
	+ One COLD morning in AA—the conference guy told me they could NOT touch the temperature in the room til the building engineer got there. It was 64 degrees in the room. People complained. Make sure the people can change the temp.
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| **Catastrophes** |
| Insist on getting a Walkie-Talkie (or get cellphone numbers) from hotel in order to reach hotel and A-V staff in a crisis ORSave the money and use cell phone, but be sure there’s coverage in the hotel (a problem in Seattle)  |
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| \*Our favorite anxiolytics & anti-stress techniques |
| 1. 0.5 mg of ativan before bedtime
2. Warm milk with honey (and a shot of rum?!)
3. Imagine your favorite past-president in the altogether
4. Make up humorous PowerPoint slides for welcoming remarks
5. Commiserate with previous local arrangement organizers!!!!
6. Wine. Lots of it. (brandy will do….)
7. Etcetera, etcetera, etcetera
8. People were really nice about things that went wrong… things will go wrong so don’t sweat it when they do.
9. Relish not having to get on a plane after SRP.
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