

# OLAC Conference Manual

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## **SECTION 1: Scope**

This manual is intended to assist the planning process for the biennial OLAC Conference. It is a compendium of information and practical suggestions to which each new organizing committee is encouraged to contribute, so that future organizers can benefit from the collective experience gained by their predecessors. The first edition of this document was prepared by Marc Richard, Co-Chair of the OLAC 2004 Conference, in response to the recommendation in the minutes of the Executive Board meeting of September 26, 2002, that OLAC should have more detailed written conference-planning guidelines. Other conference chairs have contributed the wisdom of their experience.

The manual can be used as a general template for planning the biennial OLAC Conference, but is not intended to be comprehensive and it does not give statutory conference-planning directives. It is intended to supplement formal requirements for OLAC Conference planning which are found in the OLAC Handbook (see <http://olacinc.org>.) The Handbook includes a timeline of the planning process, describes the major steps involved, and states official OLAC policy on such topics as:

- What the conference hosting requirements are
- How the conference can be co-sponsored with another organization
- What conference duties are assigned to the OLAC Executive Board, to the OLAC Vice President/President-elect or President, to the OLAC Conference Program Chair and to the OLAC Conference Program Planning Committee members
- What stipends and fees are authorized for conference organizers and speakers
- How the OLAC Conference Scholarship is awarded
- What conference documents are to be sent to the OLAC Archives

## **SECTION 2: The Organizing Committee**

### **2.1. Forming an Initial Interest Group**

Before preparing a proposal to host the OLAC Conference, potential organizers may wish to approach a few colleagues, especially local ones, to see how much interest there is to help organize the event. They might also contact previous organizers for more information about what is involved in hosting the conference. Additionally, organizers should assess whether they have the support of their own institution for becoming involved in a two-year project of this type. The amount of work required is relatively light in the first year, but becomes more intensive (particularly for the Chair or Co-Chairs) in the second year and especially in the summer months prior to the conference.

### **2.2. Establishing the Conference Organizing Committee**

Once the OLAC Executive Board has determined which location will host the next conference (see Section 3 below), the core group which made the proposal should formally establish itself as the Conference Organizing Committee and, if necessary, expand its membership.

#### **2.2.a. Committee Structure**

The Committee is usually headed either by a single Chair or by two Co-Chairs. Both approaches have been used in the past, and either one is suitable. Likewise, the Organizing Committee may be divided into Local Arrangements Committee and a Program Committee, if the members wish. In such an arrangement, one group is primarily responsible for the conference "container" (e.g., the meeting rooms, the catering arrangements, the audio-visual equipment and the tours) while the other group is primarily responsible for the conference "contents" (e.g., the speakers, the poster presentations and the preconference workshops). Note that, in practice, all the Committee members work closely together on every aspect of the planning, regardless of their specific areas of responsibility.

There is no predetermined number of members which the Organizing Committee should have; the Committees for the most recent conferences have had from eight to twelve members.

#### **2.2.b. Areas of Responsibility**

Depending on their interests and on their level of availability, the Committee members should each take primary responsibility for one or more of the tasks involved in organizing the conference. The main areas of responsibility are:

**Chair / Co-Chairs:** Responsible for the overall management of the conference planning work, for its coordination with the OLAC Executive Board, and for keeping the OLAC membership apprised of major developments as the planning moves forward.

**Treasurer / Registrar:** Responsible for financial matters, including the processing of the registration forms and the registration payments.

**Conference Webmaster:** Responsible for the conference website.

**Scheduler:** Responsible for assigning speakers, rooms and participants to each time slot so that each registrant can attend as many of his or her top-choice workshops as possible.

**Audio-Visual Arrangements Coordinator:** Responsible for providing (through the hotel and/or other sources) the audio-visual equipment needed by the speakers, e.g. laptops, data projectors, projection screens, microphones and loudspeakers.

**Convenors:** Most or all of the Committee members serve as convenors, i.e. as the primary liaison between the Committee and one or more session speakers. This involves making initial contact with the speakers, working out what their topic will be, arranging to get a short biography from them and an advance copy of their handouts, introducing them at the start of their sessions and so forth. The Chair / Co-Chairs generally convene the keynote and closing speakers. An alternate method is to have the Chair / Co-Chairs convene all the speakers, but to delegate some of the concurrent workshop introductions to other committee members.

**Executive Board Liaison:** The Vice President / President-elect of OLAC serves as the Executive Board's contact person for the OLAC Conference Planning Committee during the first year of the conference-planning process, and continues in this capacity when he or she becomes OLAC President during the second year of the process.

**Fundraising Coordinator:** Responsible for keeping track of contacts to potential national and local sponsors to request donations and of acknowledgements to be made for these donations (i.e. in the conference booklet, website, and signage, and thank-you letters after the conference). The coordinator need not be local, but there needs to be a local person on the subcommittee.

Other areas of responsibility include:

**Catering and Entertainment:** This involves setting up the Friday-evening reception (which is generally held at a venue outside the hotel) and any other planned social event, and working out with the hotel the details of the Saturday banquet lunch and of the catering for any breaks which are provided.

**Advertising / Communications:** This involves publicizing the conference locally, regionally and nationally (e.g. through library associations and listservers).

**Roommate Matching:** This involves receiving requests from registrants who wish to split room costs with someone else, then matching them up with each other.

**Poster Presentation Coordination:** This involves requesting proposals for poster presentations, assessing the proposals with other Committee members to decide which to accept, determining what physical requirements the presenters will need (e.g.

foamcore poster boards, easels, tape, thumbtacks, tables) and obtaining these materials, as well as coordinating the set-up of the room prior to the presentations and its dismantlement afterwards. The coordinator should also make arrangements to have the room locked at times when it will not be supervised, to prevent its contents (particularly any electronic equipment brought by the presenters) from being stolen.

**Conference Report Coordination:** This involves working with OLAC's Conference Report Editor to make sure that volunteer reporters attend all sessions and produce reports for the OLAC Newsletter.

**Translator:** If the conference aims to attract French- or Spanish-speaking participants by including some sessions in these languages, the conference booklet and website should provide translations to and from English for the description of these events (and, if possible, for the website as a whole).

**Sign language interpreter(s):** it may be advisable to arrange sign language availability early on for the whole conference; include the cost in the budget until/unless you learn it won't be needed; and advertise the availability of interpreters. Tell potential registrants that they must inform conference chair of their need for interpreters by a deadline, approx. 4-6 weeks before conference (or whatever cancellation date is acceptable to the interpreting agency). Cost estimate in 2008 was minimum of \$2,000.

### **2.2.c. Committee Listserve**

The Committee should set up a listserv account as soon as possible, to facilitate conference planning communications. The list should include all the Committee members, plus the Vice President / President-elect of OLAC (who serves as Executive Board Liaison to the Committee).

## **SECTION 3: Bidding to Host the Conference**

### **3.1. Proposal Requirements**

The OLAC President generally calls for proposals to host the next OLAC Conference at several points during the even-numbered year when the current OLAC Conference is held. These calls are usually made in the OLAC Newsletter, through the OLAC-List, at the OLAC Membership Meetings held during ALA Midwinter (January) and ALA Annual (June), and at the OLAC Conference itself.

The OLAC Handbook sets three basic requirements for submitting a conference proposal:

1) The invitation to host an OLAC Conference must be submitted to the OLAC President at least one week before the Midwinter ALA meeting that follows the previous OLAC Conference. It must come with the names of at least two OLAC members that agree to chair and/or serve on the Local Arrangement and Program Committees with one of those two people in or near the city where the Conference will take place. It is preferable for both of these people to have attended an OLAC Conference in the past.

2) The city being suggested for the site must have a meeting place that can adequately house the Conference. Things to keep in mind when looking into adequate meeting space are: 1) the Conference draws between 175 and 250 people, 2) some of the workshops might have as many as 100 people in them, 3) the Conference happens in the fall (usually late September/early October) so other events could compete for hotel rooms, 4) workshops often need classroom-style set ups.

3) There must be relatively easy and convenient air travel to the city from all parts of the U.S. including shuttle service from the airport to the hotel.

Potential organizers may wish to include additional information in their proposal, such as a very preliminary budget estimate based on the hotel bid the organizers are recommending. The proposal could include a complete copy of the recommended hotel bid, and could summarize the other bids and explain why they were rejected.

### **3.2. Preparing the Proposal**

Potential organizers should start doing the research for their proposal as early as possible. Hotels and other meeting venues operate on a long-range schedule when it comes to booking conference space, so it is best to start contacting them at least two full years in advance to see if enough meeting rooms and guest rooms are available at the times when the conference is to be held.

Even in a large city with a plentiful number of hotels, the number of possible venues for the conference can shrink dramatically once the organizers start eliminating those:

- which are too large, too small, too expensive or too cheap, or whose location is inconvenient or unappealing

- which have meeting rooms whose size, shape, location or quality is not suitable
- which are already booked for the dates being contemplated
- which do not offer adequate support facilities, such as space and food service for the traditional banquet lunch
- who propose contract terms that are unacceptable (e.g. too rigid or too financially risky) or who are not interested in hosting the conference
- which do not offer free Internet access to hotel guests.

The sections below offer some suggestions on how to approach potential venues and solicit a bid from them.

### **3.2.a. Identifying Possible Dates**

Organizers should identify an optimal date and several alternate dates for the conference before contacting the hotels they are considering. In this way, they will be able to determine immediately if a particular hotel, no matter how suitable it is in other respects, is simply not available for any of the possible conference dates because it is already booked.

Most previous OLAC Conference have taken place in October, with a few held in either late September or early November. When identifying possible dates, organizers should try avoiding:

- early-to-mid September (due to Labor Day and the start of the fall semester)
- Major non-Christian holidays

The Jewish holidays of Rosh Hashanah, Yom Kippur and Sukkoth (which closely follow each other and which have sometimes partially overlapped with the OLAC Conference). Muslim holidays follow the lunar calendar, and so are ten days earlier than the same holidays the previous year

Jewish Holiday Calendar:

[http://www.bnaibrith.org/programs/jholidays/2008\\_jholiday\\_calendar.cfm](http://www.bnaibrith.org/programs/jholidays/2008_jholiday_calendar.cfm)

Muslim Holiday Calendar:

<http://moonsighting.com/important.html>

- Thanksgiving Day weekend (Thanksgiving Day falls on the second Monday in October in Canada, and on the fourth Thursday in November in the United States)

The OLAC Conference generally consists of two full days scheduled for a Friday and a Saturday, bracketed by a half-day on Sunday and by one (or two) pre-conference days held on Thursday (or on Wednesday and Thursday).

### **3.2.b. Soliciting a Hotel Bid**

Most cities have a conference planning bureau of some kind that can help organizers determine whether there are possible places without having to contact hotels individually. Alternately, organizers may prefer to draw up a list of hotels on their own, decide which ones seem suitable and contact them personally.

It is helpful to prepare for the hotels a brief document (one page should suffice) which gives the preferred and the alternate dates for the conference, the expected amount of meeting space required, the expected number of guest rooms to be reserved as a block for the conference, the names of the organizers and their contact information, and any other information which is considered useful.

A hotel could be invited to bid for the next OLAC Conference on the following basis. Organizers could indicate that they are preparing a conference proposal to the OLAC Executive Board, and that they are approaching various hotels for bids to determine if any of them are suitable and affordable. It should be made clear that the final decision on which city will host the conference and which hotel will be used will be made at ALA Midwinter by the OLAC Executive Board. Some of the hotels contacted by the organizers may not be willing to bid on this basis; those who are interested will typically make a tentative reservation for the conference in their schedules and will provide the organizers with a bid. The bid may be in the form of a draft contract, and will usually include an expiry date (probably set for a week or two after ALA Midwinter) by which the hotel expects an answer, and after which the bid becomes void.

Note that the conference chair, not the OLAC President, signs contracts related to the conference including the contract with the hotel.

### **3.2.c. Estimating Room Night Requirements**

OLAC conferences typically draw between 175 and 250 people. Note that a particular number of registrants does not translate into an equal number of hotel rooms: many people will share rooms, some people will stay with friends or at other hotels, and some people will be locals who do not need to stay at the hotel. A conference with 200 registrants might therefore translate into roughly 100 rooms on the two peak nights, with even fewer rooms being taken before and after the peak nights. For attendees who wish to stay for more nights than the duration of the conference, hotels will sometimes agree to extend the special conference rate (if one is provided) so that it applies to the guest's entire stay.

Working out a realistic estimate of the number of "room nights" a conference will need is very important. Hotels hosting a conference typically make their money from guest room rentals and from catering (i.e. the banquet lunch and the food and beverages provided at the breaks) rather than from the meeting room rentals. As a result, a hotel's bid (and the subsequent contract) will typically include clauses which affect how much the hotel will charge the conference, based on how many guest rooms were reserved for the block and on what percentage of these rooms was actually filled. Hotels call this percentage the "pick-up."

When a hotel prepares its bid for the conference and/or does a credit check on OLAC (to determine if it will ask for an up-front deposit or allow OLAC to pay for the conference after its conclusion), it will typically check with the previous hotel to host an OLAC Conference to ask them whether the room pick-up was good or not. Overestimating the number of rooms needed is therefore a bad idea, because the conference may end up paying contractual penalty charges for unused rooms and because the poor pick-up may have a negative effect on later conferences. It is usually better to estimate conservatively and, if needed, to subsequently ask the hotel to increase the size of the block as needed when the conference draws near. Assuming they have available space, hotels generally prefer adding rooms to an underestimated block than canceling rooms from an overestimated one. (Hotel contracts, in fact, usually include a clause indicating by which date the hotel can unilaterally reclaim from the conference block rooms that have not yet been reserved by attendees.)

If the hotel has designated smoking and non-smoking floors, the block of rooms reserved for the conference should probably include a high percentage (approximately 75%) of non-smoking rooms.

### **3.2.d. Estimating Meeting Space Requirements**

Although organizers will not have a speaker's list at this early stage of the process, they can make a rough estimate of their meeting space requirements from those of past OLAC conferences. A description of earlier programs can be found on the OLAC website at <http://olacinc.org/>.

OLAC conference programs typically include:

- a preconference workshop, often SCCTP or NACO
- four blocks of concurrent workshops (one block each on Friday morning, Friday afternoon, Saturday morning and Saturday afternoon)
- a large opening plenary / keynote address on Friday morning
- a closing plenary on Sunday (usually smaller than the opening one because some participants will leave the conference after the Saturday sessions), which features a question-and-answer panel and a closing address
- non-workshop thematic sessions and discussion groups
- a poster presentation
- a banquet lunch and Membership Meeting on Saturday
- possible OLAC Executive Board meeting (usually held either late Thursday afternoon and on Sunday right after the conference ends)
- possible CAPC meeting
- possible meetings of ad-hoc working groups

- The program also typically features a few off-site events such as one or more tours and a Friday-evening reception.

When evaluating the meeting space which is available at a hotel, organizers should remember that some of the workshops might have as many as 100 people in them, that workshops often need classroom-style set ups (which hold fewer people than the theatre-style setups used in plenaries), and that the workshop blocks require the simultaneous use of several separate meeting rooms. Ideally, the hotel's meeting rooms should be located on the same floor. If they are on separate floors, organizers should make sure that there are enough elevators and stairways to allow large numbers of people to go from one room to another quickly and easily. There should be adequate public restroom facilities in the general area of the meeting rooms, and provisions for disabled access to the hotel, to the meeting rooms and to the public restrooms.

Hotels whose meeting rooms are connected to each other by folding walls offer the most flexibility, since they allow several small rooms to be combined into a larger one if need be. Organizers can then determine, once most of the registration forms have arrived, what disposition will best accommodate the demand for each session, based on the preferences the registrants have indicated on their forms. Bear in mind that hotels may charge extra for changing a room set-up during the course of a day, so organizers should try to make the best possible use of a single room set-up for each day.

Although hotels typically arrange the chairs and tables in their meeting rooms according to any number of standard plans, it may be possible to request an unorthodox or blended set-up to make better use of the space available. For instance, a very large ballroom could be arranged so that two-thirds of the room is disposed in theatre style (suitable for the opening plenary) while the remaining third of the room could be set up in classroom style to serve as a large workshop room. Also, if a very popular session draws more registrations than the maximum number of places allowed in classroom style (maximum capacity being governed by local fire regulations), a few extra places could be created by converting the last couple of rows to theatre style (though this means that the people in the last row will not have writing tables). Remember to provide the speakers with a table and chair, or a lectern, at the front of the room, and a table for any projection or computer equipment required.

The meeting space reserved at the hotel should include a registration / information desk (with enough tables and chairs for the volunteers staffing this desk), and designated areas for any catered breaks which are provided.

When choosing the location for the poster presentation, keep in mind that the floor plan should give participants ample room to circulate, and should enable the posters to be positioned sufficiently far apart from each other to minimize noise interference as much as possible. There should be an adequate number of electrical outlets, since some presenters may be using laptops. The possibility of offering Internet access to presenters, if it is affordable and needed, should also be considered.

The Planning Committee will need to have a room that can serve as an informal conference organizer's office and which can be used to store audio-visual materials, signs for the workshop rooms, and poster session supplies (foamcore poster boards, easels, adhesive tape, thumbtacks and so forth). One approach is to use the hotel room

of the Chair / Co-Chairs for this purpose. It is generally a good idea for the local Chair / Co-Chair to have a room at the hotel, even if he or she lives nearby and does not plan to sleep at the hotel, since it will provide a convenient on-site base of operations during the daytime.

### **3.2.e. Estimating Audiovisual Requirements**

Audiovisual rental can be a major expense, so conference organizers should provide their own materials as much as possible, provided that the conference center allows it. (Onsite technical support may not be available unless the conference is renting materials from the venue.)

Presenters may not necessarily know their audiovisual requirements until a few weeks prior to the conference, but organizers should arrange for a minimum of:

LCD projector

Projection screen

Podium

Flipchart

Wired or wireless microphone (for large group sessions)

Easels, foam boards (for poster session)

Internet access (if not included in meeting room rental; ask when signing contract)

These requirements will of course change as technology evolves.

Most speakers will provide their own laptop computers; however, it is helpful for committee members to have extra laptops available to lend if necessary.

## **SECTION 4: Theme and Content**

### **4.1. Theme, Opening Keynote and Closing Address**

The theme (or title) of an OLAC Conference does not need, strictly speaking, to reflect the entire content of the event, but it should relate to the subject of the keynote address. Organizers may wish to begin by identifying a theme, then find a keynote speaker who can give an interesting talk on this subject, or they may prefer to start by identifying an interesting speaker they would like to invite, then devising a theme which fits the person's area of expertise.

A list of the titles of previous OLAC Conferences is available on the OLAC website at <http://www.olacinc.org>. These can provide ideas, and will show what themes have already been used.

Another source of inspiration is to post a message on the OLAC-List requesting theme suggestions from members. Such messages should be phrased in a very general way, saying the Committee is looking for idea for topic rather than specific speakers. The message should probably not mention theme ideas already discussed by the Committee; otherwise, members may zero in on the existing topics (rather than thinking up new ones) and the discussion may turn into a collective debate on which theme the Committee should choose.

Discussions regarding specific speakers should be kept within the planning group, since they often involve candid assessments of who might or might not be a good speaker. When additional opinions are needed on this subject, they should be sought from specific individuals known to the committee members, for reasons of confidentiality.

Unlike the core workshops (see Section 4.2 below), which focus on practical cataloging, the opening keynote speech is well suited to examining "big picture" subjects such as future trends and philosophical issues. For the closing address, the Committee may wish to invite a speaker who will give another perspective on the topic discussed by the keynote speaker, or someone who will give a thought-provoking talk on a completely different topic.

### **4.2. Main Workshops**

The core events of an OLAC Conference are the two-hour training workshops. These are given in four blocks: one on Friday morning after the opening keynote address, one sometime on Friday afternoon, one sometime on Saturday morning, and one Saturday afternoon after the banquet lunch.

Several workshops are given simultaneously during each block, so each participant will therefore be able to attend only four of these core workshops. On their registration forms, participants are asked to rank their workshop choices by order of priority, so that the scheduler can try as much as possible to give everyone their top four choices. Core workshops are nearly always given twice (once on Friday, once on Saturday), with

different combinations of workshops used in each time slot in order to increase the opportunity for participants to attend most or all of their top choices.

Most of these core workshops focus on practical training (either at an introductory or advanced level) in cataloging specific formats of materials. Usually in highest demand at OLAC Conferences are the workshops on cataloging Videorecordings and Electronic Resources. Any OLAC Conference should therefore include sessions on these two subjects. Other core workshop topics in recent years have included the cataloging of Music Scores, Musical Sound Recordings, Maps, Cartographic Materials on CD-ROM, Graphic Materials, Still and Moving Images, Digital Sound Files, Realia, Oral History Materials and Integrating Resources. Generally, these workshops are built around a PowerPoint presentation and a corresponding handout, and in some cases include practical exercises

A few of the core workshops at each conference can focus on topics other than the cataloging of a specific format, but they should be few in number and they should at least be related to practical cataloging in some way. Recent workshops of this type have included sessions on the use of Genre/Form Terms for Audio-Visual Materials, the Future of the GMD and the Subject Analysis of Non-Book Materials. By and large, however, sessions which do not involve formal instruction on the cataloging of a specific format should be held outside of the core workshop blocks, at times reserved for general-interest sessions and discussion groups.

#### **4.3. Preconference Workshops**

OLAC Conferences often feature one or more preconference workshops, such as an SCCTP workshop and/or a NACO/AV training session. These sessions are organized by the Committee in cooperation with SCCTP and OLAC's NACO-AV Funnel Coordinator. Registration is handled through a separate box on the registration form, and should be paid for with a separate check since the budget for these events is distinct from the conference budget.

#### **4.4. Thematic Sessions, Panels and Discussion Groups**

Outside of the four main workshop blocks, there is usually room for a few other special-interest sessions. These can take the form of plenaries or concurrent smaller sessions. Recent examples have included a plenary on a metadata sharing initiative at the University of Minnesota, a discussion session on access points for non-human actors, showcase sessions on the Bibliothèque Nationale du Québec and on Library and Archives Canada, roundtables on various cataloging issues, "birds of a feather" discussion groups and a panel on library education. Unlike the core workshops, these types of sessions do not have assigned attendance lists; participants are free to go to whichever session they like, as long as there is space available.

On the closing day of the conference, there is generally a Question and Answer session in which a panel of experts drawn from the conference participants takes questions from the audience. The organizers may wish to solicit questions in advance, either on the conference website or through a Q&A Panel box placed near the box used to collect the conference evaluation forms.

#### **4.5. Poster Presentations**

A single-event block of time, approximately 60 to 90 minutes long, is usually reserved for a poster presentation session. Registrants are free to visit the room at their leisure at any time during this period. Presentations typically comprise one or more posters and various handouts, with commentary from the presenter. Some presenters may wish to use a laptop and other materials in addition to their poster.

Calls for poster presentation topics are made through the OLAC-List about a year before the conference, with periodic reminders. A sample application sheet is included in the Appendix section of this manual. The proposals are evaluated by the Committee about three months before the conference. Based on the suitability of the proposals and on the amount of space available in the room that will be used for the presentations, the Committee decides which proposals will be accepted and notifies the applicants.

#### **4.6. OLAC Meetings**

The conference program should provide time and a room for a meeting of the OLAC Executive Board on the afternoon of the Thursday preconference day. The Chair / Co-Chairs of the Conference Committee attend this meeting to report on the final details of the conference planning.

A short meeting of the Executive Board is usually held on Sunday, after the end of the conference. Since hotel meeting room rentals generally apply for an entire day, and since the final plenary session of the conference is usually held on Sunday morning, the Committee should ask the hotel to keep the plenary room available for use by the Executive Board during the afternoon. This will avoid the unnecessary cost of renting an additional room just for this meeting. The Executive Board may choose to have lunch first and return for its meeting, or may meet immediately after the conference ends; in the latter case, the room will not be needed later in the day.

An OLAC Membership meeting is held during the conference, as part of the Saturday banquet lunch. The event should be scheduled in such a way that registrants can have lunch first, with the meeting starting during (or soon after) the dessert course; otherwise, noise from the meal will interfere with the speakers, and the participants will be forced to divide their attention between their food, the conversations at their table and the reports of the speakers.

The schedule should also provide for a meeting of CAPC, either in a single-event block of time or concurrently with thematic sessions and discussion groups. The Outreach-Advocacy Coordinator may also wish to schedule an Outreach-Advocacy meeting.

#### **4.7. Tours**

The preconference day offers an opportunity to hold organized tours of nearby libraries, audio-visual facilities or other places of interest. Arrangements may involve placing limits on the number of people who can attend. A modest tour fee may be required if mass transportation needs to be arranged, or if there is an admission fee to enter the places being visited.

#### **4.8. Friday Evening Reception**

A popular part of the conference program is the reception held on Friday evening after the first full day of sessions. The reception is an informal event at which light refreshments are served and conference participants can socialize in an enjoyable setting. At the 2002 Conference, the reception consisted of a cruise on a Mississippi riverboat, while in 2004 it was held at the McCord Museum of Canadian History and Culture. The reception can be scheduled either as an early event, after which participants can go to dinner on their own, or somewhat later in the evening, to allow participants to have dinner first.

## **SECTION 5: Finances and Budgeting**

### **5.1 General Financial Arrangements**

#### **5.1.a. Conference Checking**

One person on the local arrangements committee is designated as the Conference Treasurer. The Conference Treasurer should look for a bank that will provide free business checking. The Conference Treasurer should contact the current OLAC Treasurer/Membership Coordinator to request pertinent copies of OLAC's articles of incorporation, generally required by banks for establishing a business checking account. The Conference Treasurer shall have signatory authority for the conference checking account. It is a good idea to have another person on the Local Arrangements Committee, such as the Conference Registrar, with signatory authority for the conference checking account. The Conference Treasurer shall notify the OLAC Executive Board of the names with signatory authority. The Conference Treasurer should open the account with the arrival of the first checks from registration fees. When necessary, the Conference Chair and Conference Treasurer may ask for advance funds from the OLAC treasury if funds are required to secure something for a special conference event.

#### **5.1.b. Membership with Conference Registration**

Non-OLAC members may register for the conference and pay the member rate if they also pay membership dues at the time of registration. New members paying membership dues at the time of registration for the member registration rate shall receive a membership for the period of their choice (1, 2, or 3 years) beginning with the next calendar membership year. (This was a 2002 Exec Board decision to allow new members a full year's benefit of membership, as most apply and register in August and September when the membership year is mostly over.) The Conference registration shall clearly state the above exception to the non-member registration rate. The Conference registration shall clearly state that new members must fill out the membership form and mail it with the conference registration. The Conference Registrar shall retain the membership applications and keep account of the membership dues submitted with registrations. Upon closure of registration, the Conference Registrar shall mail the new membership applications to the OLAC Treasurer/Membership Coordinator. Upon closure of the conference checking account, the Conference Treasurer shall mail a check the equals the sum of the new membership dues collected with the conference registration along with or included in the check with the Conference profits.

#### **5.1.c. Payments**

Most attendees want to register and pay electronically. If using PayPal or another service, be sure to factor in online payment system fees into the registration cost. The Conference Registration form must clearly state that checks are payable to OnLine Audiovisual Catalogers (or OLAC). To avoid confusion, make sure this statement is prominent, easily identifiable, and separated from the mailing address with the C/O name of the Conference Registrar. This will help prevent receipt of checks written out to

the Registrar by name or the Registrar's institution—two common problems with Conference payment checks.

Some institutions will pay by purchase order (PO). The OLAC Conference Registrar shall mark registrants paying with POs as paid, and forward the PO to the Conference Treasurer. The Conference Treasurer shall send a simple invoice (which may be created on a word processing document with the OLAC logo) with a copy of the PO to the institution, which will then remit payment.

#### **5.1d IRS W9 forms**

Some institutions require the IRS W9 form before they can make payment. Contact the OLAC Treasurer/Membership Coordinator for a current copy of OLAC's W9 form with the Federal Employer Identification Number (EIN).

### **5.2. Financial Arrangements for OLAC Conferences held in Canada**

***Note: the information in this section is from 2004. Some details may have changed.***

#### **5.2.a. Bank Accounts**

Because OLAC does not have a credit card billing account, OLAC Conferences held in Canada require special arrangements to deal with the two different currencies that are involved.

The organizers should open two bank accounts in the conference's name (e.g. "OLAC 2004 Conference"): one in U.S. dollars and one in Canadian dollars. This should be done around the time when the organizers expect to receive their first income, such as contributions from sponsors or advance funds allocated by the Executive Board. The paperwork involved can be lengthy, so the organizers should allow themselves sufficient time to find a suitable bank and to determine which type of account best fits their needs and charges the lowest fees. The OLAC Treasurer can provide the organizers with some of the documentation they will need, such as a copy of OLAC's incorporation papers and information on its U.S. bank account. The organizers should not open their accounts too far ahead of receiving their first cheques, to avoid having to pay service charges on accounts that sit empty for months on end.

The U.S. currency account for the conference is used to receive and make all payments involving U.S. currency, and the Canadian currency account is used to receive and make all payments involving Canadian currency. If necessary, some of the funds in one account can be transferred to the other account, but this should be done sparingly to keep currency exchange fees to a minimum. Once the conference is over and all final bills have been paid, any funds remaining in the Canadian currency account are transferred to the U.S. currency account, the combined amount is sent by cheque to the OLAC Treasurer and the two accounts are closed.

### **5.2.b. Registration Payments**

On the registration form, the registration fee for the OLAC conference should be stated in U.S. funds for U.S. and international participants, and in the equivalent amount of Canadian funds (calculated at the time when the fees are set) for Canadian participants. Participants should pay in the currency corresponding to their country.

Registration payments can be made by cheque, made out to the name of the conference bank account (e.g. "OLAC 2004 Conference"), or by PayPal if the registration is set up that way. Postal money orders cannot be processed because the conference is not a legal entity that can identify itself as such to Canada Post. It has not been determined if bank money orders can be processed. In special circumstances (e.g. for international participants having no other recourse), it is possible for a payment to be made by bank-to-bank money transfer, but the details need to be arranged on an individual basis.

Participants who wish to register for preconference workshops (such as SCCTP) should pay for these with a separate payment, since they are separately budgeted. A separate payment also makes it easier to return the preconference registration fee to participants who cannot be signed up because the workshop's maximum number of places has already been filled.

Some participants may wish to pay their registration fee by institutional purchase order. Under this arrangement, the participant will send the conference registrar a purchase order; the registrar prepares an invoice quoting the purchase order number and mails it back to the institution, which will then send a cheque for the registration fee.

In a small number of cases, a participant may come from an institution which requires all suppliers to fill out some sort of government registration form, or which requests that the conference provide a taxpayer identification number. Because OLAC Conferences based in Canada have no legal capacity to do so, participants from such institutions should instead be encouraged to pay for the registration by personal cheque and to seek reimbursement directly from their employer.

OLAC membership payments (both new memberships and renewals) sent with the registration fee should be made by a separate payment in U.S. funds only, regardless of the country where one lives. The membership form can be downloaded from the OLAC website.

### **5.2.c. Foreign Conference Tax Credits**

Under Canadian law, conferences held under auspices of an organization based outside of Canada and which are expected to have a preponderance of non-Canadian participants may be entitled to certain benefits, including rebates on the Goods and Services Tax paid on conference organization expenses. Some provinces may have programs offering similar provincial sales tax rebates (as is the case in Quebec).

Note that these rebates should not be built into the conference budget because there is no guarantee that the conference will ultimately qualify for them. OLAC 2004, for instance, aimed for a balanced budget without the tax rebates, and would have

considered any such rebates to be post-conference windfall money. In the end, OLAC 2004 did not prove eligible for the rebates because the percentage of non-Canadian registrants did not meet the required minimum of 75%.

Conference organizers should contact the Canada Revenue Agency to determine what foreign conference incentive programs are currently applicable. If these programs are similar to those which were in place during the OLAC 2004 Conference in Montreal, they will probably involve two components:

- Registering the conference with the Conventions division of the CRA. This component should be fairly easy, involving nothing more than a phone call and a follow-up letter to the closest Regional Convention Coordinator. The RCC will then issue a letter that officially grants foreign organization status to the conference and which will authorize conference audio-visual equipment, souvenirs and exhibition materials to be imported duty-free. For a conference like OLAC, which generally does not feature exhibitors, this authorization is not particularly relevant, but since it is easy to get the organizers should apply for it anyway because the letter could prove useful in other ways. A copy of the letter, for instance, should be sent all speakers and workshop leaders coming from the U.S.; this document is not actually required for them to enter Canada, but they might want to bring it along anyway in case they encounter difficulties.

- Obtaining an RM (importer) Business Number (BN) from the CRA. This was done for OLAC 2004 so that the conference would be able to claim its GST rebate if the conference ended up meeting the rebate eligibility requirements (which, in the end, it did not). The process of getting this number proved very complex, and the CRA gave conflicting information as to whether the BN was necessary to claim the tax rebate. Organizers of any future OLAC Conferences in Canada should assess whether applying for this business number is more trouble than it is worth. OLAC 2004 drew much higher number of Canadians than anticipated, and therefore did not meet the 75% non-Canadian registration threshold required for the tax rebate.

### **5.3 Registration Waivers, Speaker Honoraria and Stipends**

The conference registration fees are waived for members of the Conference Organizing Committee. They are not waived for members of the Executive Board.

The basic terms governing honoraria and stipends for conference speakers and workshop leaders are given in the OLAC Handbook. If the conference budget is adequate and with permission from the Executive Board, it may be possible to make adjustments to these figures on a case-by-case basis. For example, the organizers may choose, if their budget permits, to extend a registration waiver to all conference speakers and workshop leaders. This was done in 2004 and 2008, for example, on the principle that the organizers should not pay speakers an honorarium with one hand, only to charge them an even larger amount in registration fees with the other.

Anyone whose registration fee has been waived still has to fill out a registration form, so that the organizers can keep an accurate count of how many people to expect.

Note that some speakers and presenters may choose to waive all or part of their honoraria and stipends -- for instance, if they have received travel funding from their institution to attend, or if presenting material at the conference is already considered to be part of their position responsibilities.

The 2006 conference reimbursed speakers and presenters as follows:

*Opening and Closing conference speakers*

Honorarium (\$100).

All expenses (transportation, hotel, meals, and registration fee)

*Workshop Leaders*

Honorarium (\$100).

Transportation (up to \$400, budget permitting) Mileage for those who drive paid at rate of the host institution

Registration fee waived

Workshop leaders were responsible for their own hotel costs, and meals that weren't included in the conference registration.

#### **5.4. Fundraising and Sponsors**

A fundraising coordinator should be appointed early on. This person does not have to live locally, but should be a member of the committee.

Organizers should seek to obtain funding for the conference from potential sponsors. Initial solicitations should begin no later than the autumn of the year preceding the conference. Note that many organizations encumber money for donations up to a year in advance, so it is important to contact potential sponsors early. Sponsorships are acknowledged on the conference website, in the conference booklet, and onsite at the conference as is explained in more detail in Part 6.

Potential sponsors include library service organizations (such as OCLC, which maintains formal ties with OLAC), library automation firms, publishers and vendors of library and audio-visual products. Some national, regional and local library associations and interest groups have funds designated to support projects of interest. University and public libraries in the host city of a conference may also be interested in contributing, for instance by sponsoring one or more of the catered breaks. Grants from government agencies or local tourism development initiatives are another potential source of funds. One source of ideas and contact information is the list of sponsors and exhibitors from major library conference (such as ALA) held during the current year. Members of the conference committee and fundraising subcommittee should solicit donations from the institutions where they are employed.

In addition to direct financial contributions, businesses and public agencies may be willing to provide contributions in kind such as program printing or pens, notepads and folders for the registration packages. Local businesses are a potential source of colorful plastic or cloth bags decorated with the supplier's logo, in which conference documentation can be provided as part of the registration package.

Whatever type of contribution is made, sponsors are welcome to provide pamphlets, brochures and other advertising materials. If enough copies can be provided for everyone, and if the materials are sufficiently compact, these can be included in the registration packages themselves; if only a few copies are supplied and/or if the materials are bulky or heavy, they can be made available on a handouts table near the registration desk.

Prior to contacting potential sponsors, the fundraising coordinator should determine the terms they will propose for sponsorship categories. One approach is to estimate what the average cost of the workshops will be (photocopy expenses, speaker stipends, etc.) and to choose a percentage of this cost (say, 30 to 50 percent) that will serve as a benchmark. Sponsors contributing this amount or more could be designated as "major sponsors" and could have their name associated to a particular session of their choice. Sponsors contributing less than the benchmark could be designated "other sponsors" without a specific sponsored session. See Part 6 for further details on session sponsorships and on website acknowledgements.

An Internet search and/or telephone call will usually provide the name and contact information for the person responsible for donations at the institution to be solicited. The initial approach may be an email letter followed up with a telephone call.

Letters of thanks should be sent to all sponsors as soon as their contribution is received, as well as a second letter of thanks after the conference.

## **5.5 Volunteers**

To save on costs, organizers should solicit volunteers who would be willing to help with such tasks as staffing the registration / information desk. Colleagues from the organizer's home institution and local library school students are two potential groups of volunteers. Letters of thanks should be sent to all volunteers after the conference.

## **SECTION 6: Conference Website**

### **6.1. Preliminary Version of Website**

A preliminary version of the conference website should be made available about one year prior to the start of the conference. At this early stage of the planning process, the website will only be able to provide limited information on the conference program and speakers, but the details which have already been decided should be given. In this way, the organizers can start advertising the conference (particularly on the OLAC-List), and potential registrants can start making plans to attend. This early version of the site is potentially very useful to registrants who wish to apply for funding from their home institution, since such applications often need to be made long in advance of an event.

The preliminary website should provide:

- The title / theme of the conference
- the dates of the conference and of any preconference events planned
- the city where it will be held, along with information on how to travel there and how to get from the airport to the conference hotel
- the name and address of the conference hotel, along with complete contact information, a link to the hotel website, the details of the special rate for the rooms in the conference's reserved block, instructions on how to make a reservation for a room in that block, a map of the hotel's location and parking information for anyone planning to drive there
- the planned cost of registration, if it has already been determined and approved by the Executive Board
- local information on the host city, including a few links to websites of interest (e.g., the local Convention and Visitor's Bureau, major attractions, tour operators and maps)
- if the conference is being held outside the U.S., information on local currency, tax credits for visitors, and any visa, passport or other documentation requirements for entering the country and returning home

The conference organizers should contact the OLAC Webmaster to request that a link to the conference website be added to the Conference page of the OLAC website.

### **6.2 Website Updates and Final Structure**

As more details of the conference are worked out, the website should be updated periodically and these updates should be announced on the OLAC-List. All sections of the website should be complete by the time that conference registration opens, i.e. around the spring or early summer of the year in which the conference is being held.

The complete website should have pages corresponding more or less to those on the following list:

- Homepage
- Registration
- Hotel Information
- Roommate Matching
- Travel Information
- Local Information
- Schedule
- Preconference
- Tours
- Keynote and Closing Speakers
- Workshop Descriptions
- Workshop Leaders
- Poster Presentations
- Reception

If translated versions of all or some of the site's pages are available, there should be a link which allows users to switch easily from the English version to the translated one and back again. All the pages should allow direct clickable access to all the main sections of the website.

### **6.2.a. Homepage**

The homepage should feature the conference title, location, dates and logo, followed by an invitation to attend the conference. The page should then list the members of the Organizing Committee, giving their names and institutional affiliations; for the Chair / Co-Chairs, phone numbers and e-mail addresses should also be given.

The title page should also list the conference's sponsors. Each sponsor's logo (or simply their name, if no logo is available) should provide a clickable link to the sponsor's website. If two sponsorship categories are established (major sponsors giving over a certain amount which entitles them to sponsor a specific session, and other sponsors who have given smaller contributions), the homepage should identify these two groups of sponsors with appropriate headers.

The bottom of the homepage should display a clickable OLAC logo, give a copyright notice, and give the Webmaster's name and e-mail address.

### **6.2.b. Registration**

This page should give:

- complete details on conference fees, registration procedures and payment instructions, including applicable charges for late registrations
- links for online registration and options to download both the registration form and the OLAC membership form

- an explanation of difference in registration rates between members and non-members, and of the membership year covered by the membership form
- the deadlines for normal registration and late registration (including an explanation that this refers to the dates when the forms are received by the registrar, not the dates on which they were mailed)
- the refund policy for cancellations received up until the close of normal registration, during the late registration period, and after the close of late registration
- the name, mailing address and e-mail address of the conference registrar

### **6.2.c. Hotel Information**

This page should give:

- the name and address of the conference hotel
- complete contact information and a link to the hotel website
- details of the special rate for the rooms in the conference's reserved block, plus instructions on how to make a reservation for a room in that block (including procedures for making online reservations)
- parking information and a map showing where the hotel is located

Participants should be encouraged to make their hotel reservations as soon as possible, particularly if they have preferences regarding smoking versus non-smoking rooms.

### **6.2.d. Roommate Matching**

For participants who wish to split their hotel costs by sharing a room, OLAC customarily provides a limited roommate-matching service. This is done on the conference website, using either the registration form or a separate roommate matching page on which participants can enter their needs and requests. The submission deadline on the form should be set at about two months prior to the start of the conference. The organizer pairs up names based on the information provided and puts potential roommates in touch with each other, but does not make hotel reservations on their behalf and assumes no liability for matching individuals.

Rather than creating their own roommate-matching form, organizers may find it simpler to copy and adjust the electronic form used at previous OLAC Conferences.

### **6.2.e. Travel Information**

This page should give information on how to reach the conference city by air and other means of transportation, and should explain in detail how to get from the airport to the conference hotel. A link to the website of any airport shuttle bus services is particularly

helpful, as is information on public transit services in the area. Information on local currency, tax credits for visitors and documents required to enter the country and return home should be included if the conference is being held outside the U.S.

#### **6.2.f. Local Information**

This page should provide guidebook-type information which visitors might find useful. It should indicate the seasonal temperatures and weather conditions which typically prevail at the time of year for which the conference is scheduled. It should also provide links to the local Convention and Visitor's Bureau, to major attractions (especially those close to the hotel), to companies offering city tours, to restaurant lists and to maps.

#### **6.2.g. Schedule**

This page presents the conference schedule as a brief table giving the time, name and location of each event. The schedule-at-a-glance table (which is customarily reproduced in the conference booklet) indicates when the four blocks of main workshops will be, but does not give a specific breakdown of the times and rooms for each workshop. The reason this breakdown cannot be included in advance is that the detailed schedule of main workshops can only be established in the last couple of weeks before the conference, when all the registration forms have been received and tabulated. The level of demand for each session then determines how best to schedule the main workshops within the four blocks of workshop time. All participants receive a customized list of workshops in their registration packages, while the schedule-at-a-glance is simply intended to serve as a concise, convenient outline of the conference schedule.

#### **6.2.h. Preconference**

This page gives the titles and abstracts for the preconference workshops and brief biographies for the presenters. It acknowledges the major sponsors (if any) who provided financial support for the session; these sponsor names should be made into clickable links to the sponsor's website. This information also appears in the conference booklet.

#### **6.2. Tours**

This page describes the tours being offered on the preconference day. It indicates the costs (if any) and the maximum number of participants, and refers participants to the registration form for details on how to sign up. Since tours generally start from the hotel, the instructions tell participants where and by what time they should gather so that they can leave as a group; travel instructions are also provided for people who want to travel on their own to the tour destination. The page includes links to the website of the institutions being visited.

### **6.2.j. Keynote and Closing Speakers**

This page gives the titles and abstracts for the opening keynote speech and the closing address and brief biographies for the speakers. It acknowledges the major sponsors (if any) who provided financial support for the session; the sponsor names should be made into clickable links to the sponsor's website. This information also appears in the conference booklet.

### **6.2.k. Workshop Descriptions**

This page gives the titles, speakers and abstracts for the major workshops and the other conference presentations. It acknowledges the major sponsors (if any) who provided financial support for the session; the sponsor names should be clickable links to the sponsor's website. This information also appears in the conference booklet.

### **6.2.l. Workshop Leaders / Presenters**

This page gives brief biographies for all preconference, keynote, closing, workshop and presentation speakers (except for those giving poster presentations). This information also appears in the conference booklet.

### **6.2.m. Poster Presentations**

This page gives the titles, speaker names and abstracts for the poster presentations. This information also appears in the conference booklet.

### **6.2.n. Reception**

This page indicates the time and location of the Friday evening reception and describes the event and its venue. It includes a reminder that the registration form has a section where participants can indicate if they will be attending the reception, and which explains how to purchase additional tickets for any unregistered guests they wish to bring. The page also gives information on how to reach the venue and indicates how far away it is, so that participants can determine whether to walk there or take surface transportation. The main points of this information should appear in the conference booklet, along with a map.

## **SECTION 7: Registration**

### **7.1. Registration Form**

Online registration and payment should be available on the conference website and most registrants will choose to use that method. Mail-in registration of printed forms should also be available. Additional instructions and information that cannot be accommodated on the registration form itself should go into a separate document. Organizers should contact the OLAC Newsletter Editor well in advance of the June issue's deadline to discuss including a description of the conference program in that issue.

The registration form (of which there is a sample in the Appendix) should provide:

- the title, date and location of the conference
- the name and address of the person to whom the form and payment should be sent
- a section in which to write the name, address, phone, fax number and e-mail address of the registrant, with a note stressing that the e-mail address is very important
- checkboxes to indicate if the registrant is an OLAC member, isn't a member, or isn't a member but is joining and including the membership fee
- a checkbox to indicate first-time attendance at an OLAC conference
- lines on which registrants can indicate special dietary needs and special physical needs
- a general description of the banquet lunch and a choice to be circled for the main course (generally two meat choices and one vegetarian choice)
- a list of tours, which registrants can select if they wish
- a list of the main workshops, with instructions to rank these by preference in numerical order (e.g. from 1 to 8, each number only to be used once, with 1 representing the highest preference and 8 the lowest)
- a section in which the registrant indicates the appropriate registration fee: one for members, one for non-members, a discounted fee for students and (for applications received after the registration deadline) a supplementary late fee
- a line for purchasing extra guest tickets to the Friday-evening reception at an additional cost
- a line on which the total fee is entered
- a section for entering OLAC membership payments / renewals

- a section for registrations to the preconference, which are paid for separately

## **7.2 Deadlines, Fees, Cancellations and Refunds**

Registration should open no later than June 1st of the conference year, and preferably one or two months earlier. A recommended deadline (i.e. the date by which registration forms will be received) for the end of the normal registration period is one month prior to the start of the conference. A recommended deadline for the end of late registration is two weeks before the conference, since this is roughly as late as organizers can wait before committing themselves to certain expenses such as the number of banquet meals to be served.

Participants should be encouraged to register as soon as possible, and reminders of the registration deadlines should be posted periodically on the OLAC-List. Early registration greatly helps the organizers plan their expenses and their requirements for supplies, photocopying and catering services, and it benefits the participants because those who send in their forms first are given a higher priority when the scheduler assigns workshops based on the preferences indicated on the registration forms.

As per the minutes of the Executive Board Meeting held September 26, 2002, the registration form must include a clearly written cancellation policy. The policy established for OLAC 2004 was:

- refund requests to be sent by e-mail to the conference registrar
- full refunds for cancellation requests received by the end of regular registration period
- half-refunds for cancellation requests received by the end of late registration
- no refunds for cancellations received after the end of late registration or for registered participants who did not attend
- refunds made only for the main conference fee and for the preconference workshop fees; OLAC membership fee payments not refunded

When setting the registration fee, organizers should set the non-member fee higher than the fee for members. It is recommended that the non-member conference fee be set slightly higher than the combined cost of the member conference fee and the cost of a two-year OLAC membership, as an incentive for non-members to join. A discounted student conference fee should also be offered, to encourage participation by library school students.

Registration fees are customarily for the entire conference. Single-day registration options have generally not been offered, though a special fee for participants attending only the French-language Friday workshops was available at OLAC 2004.

### **7.3 Processing Registration Forms and Payments**

Each registration form received should be numbered consecutively, by order of arrival, using a brightly-colored marker. The registrar should make an entry for each form in a logbook, indicating the number of the form, the name of the registrant (and, if different, the name of the institution which issued the accompanying check), the sums received (main conference fee, preconference fee, OLAC membership payments, guest tickets for the reception, etc.) and other relevant details. The registrar may wish to stick colored adhesive tabs or Post-it notes to the forms to identify special categories of registrants such as organizers, speakers and preconference participants.

Registrants are entered into an Excel spreadsheet or a Word file, which is later used to produce the payment receipts, the name tag labels, the registration package name stickers, the individual workshop schedules and the list of participants that is included in the registration package.

As each new batch of forms is processed, the registrar should send an e-mail to the registrants confirming that their form and payment have been received. The e-mail should remind registrants that a receipt for their payment and a personalized schedule of workshops will be included in the registration package that they will pick up on the opening day of the conference. The e-mail will also serve to confirm the e-mail addresses of the participants, and can be used to request any information that is missing or illegible on the registration form.

For events (such as the preconference workshops) which have limited seating, the registrar may wish to keep a waiting list, in case a cancellation is received from someone who is already registered for a session. Note that, for preconference events, late cancellations may only benefit local participants who are on the waiting list because most people traveling to the conference will not be able to change their flights at the last minute and arrive a day or two earlier than they had planned.

### **7.4 Invitation Letters**

Participants from overseas may require visas to come to the conference. In some cases, participants will request a letter from the organizers inviting them to attend the conference; this letter is used by the participants to obtain a visa. A sample letter of invitation is included in the appendix. The letter of invitation does not confer any special status on the participants, and they register and pay normally; the letter is simply a confirmation to consular authorities that a participant is traveling to a genuine conference.

### **7.5 Pretext Inquiries and Requests for Subsidies**

In addition to requests for letters of invitation from bona fide cataloging professionals, OLAC Conference organizers have sometimes received overseas inquiries from individuals whose status is questionable. In some cases, these inquiries have been honest mistakes by individuals who discovered the conference website and who misunderstood the conference to be related to their field of interest (e.g. Internet data

transmission). In other cases, however, they originated from individuals or groups who did not appear to have the foggiest idea of the conference's intended audience but who nevertheless wished to register for it. The motive for at least one of these inquiries -- as its author eventually admitted -- was to obtain a letter of invitation that would allow him get a visa to enter the country for personal business on the pretext of going to the conference.

Suspicious inquiries of this nature should be handled very cautiously, and organizers should keep the OLAC Executive Board informed in case legal counsel is required or immigration authorities need to be contacted. Responses to such an inquiries might focus on explaining the nature of the conference and specifying that its advanced training workshops are of no possible use or interest to anyone other than a cataloging specialist (and thus that it would be a complete waste of time and money for the person to attend if he or she is not a trained cataloger already).

Organizers have also received overseas inquiries from bona fide cataloging professionals who have requested subsidies to attend an OLAC Conference. Organizers should explain that participants are expected to pay their own way and that OLAC does not have the resources to fund participants except to the extent that it offers a single conference scholarship on a competitive basis. The details of this scholarship can be provided, with the caveat that an applicant must be a personal member of OLAC who has never attended an OLAC Conference.

## **7.6. Scheduling Workshop Attendance**

Database software makes the task of scheduling workshops and attendance easier than doing it manually. Specialized conference scheduling software program is available and ideal, but Microsoft Access works pretty well.

Macon 2010 continued the recent practice of asking registrants to rank their top eight choices for breakout sessions. The goal was to provide each attendee with his/her top two choices, and four of the top five.

A few presenters had scheduling preferences; those were accommodated.

Breakout room capacities were based on the "classroom" arrangement.

## **SECTION 8: Physical Setup and Event Coordination**

### **8.1. Handouts and Photocopying**

It is difficult to determine photocopying needs and expenses at the budgeting stage. If organizers wish to provide photocopying for breakout presenters, this should be decided well in advance. Some presenters may have their handouts and/or presentations ready to post on the conference website beforehand. The materials should definitely be posted within a few days following the event.

It is possible that the keynote speakers will have handouts; if asked to provide copies, get a quote based on the anticipated number of attendees and a document of reasonable length.

### **8.2. Signage**

In advance of the conference, prepare signs that give the name of each meeting room in the hotel where the conference sessions will be held; have one sign per room for each of the days of the conference. On each daily sign, give the date and indicate the times and titles of each session in the room, and acknowledge any session-specific sponsorships.

An inexpensive way to produce these signs is to print them with a laser printer on ordinary paper, fasten them to a cardboard rectangle with double-faced tape, and attach the cardboard to the wall beside the door using non-staining adhesive putty (or other approved material supplied by the hotel). At the end of each day, replace the signs with the next day's signs. Keep a supply of blank pages and markers on hand to make corrected signs on the spot if there are any last-minute changes.

### **8.3. Registration Packages**

Conference participants arriving at the registration desk should receive a folder containing the main registration documents, plus a plastic or cloth tote bag containing additional materials (and which can be used to carry the handouts they collect during the conference).

The folders are customized for each participant, and are identified by an adhesive name label on the front. Each folder contains:

- the conference booklet, which typically lists the sponsors, the Organizing Committee members and the Executive Board members; provides a schedule-at-a-glance for the conference and a small map of the hotel's conference floors; gives the titles, abstracts, presenters and sponsors of all the sessions, as well as speaker biographies; and provides a simple map of the hotel's neighborhood
- the participant's name tag
- the participant's personalized workshop schedule

- the participant's payment receipt
- the participant's ticket for the Friday evening reception, plus any guest tickets that were purchased
- any handouts which give important conference information, such as instructions on getting to the location of the Friday evening reception or lists of the discussion sessions to be held
- a list of conference attendees, giving their name, affiliation and e-mail address
- the conference evaluation questionnaire. (Optional. See Section 8.5 below.)
- (for speakers and workshop leaders only) a form and instructions for submitting their expense report when claiming their stipend and honorarium
- (for poster presenters only) final instructions and a floor plan of where they are to set up their respective materials
- (for speakers, workshop leaders and poster presenters only) a card thanking them for their participation
- (for conference organizers only) a master schedule showing which session each organizer and speaker is supposed to be attending at what times, and listing who is slated to introduce each speaker, so that individual organizers can be located quickly if a problem arises

The tote bag is a generic package of supplementary material containing such things as:

- free city maps, pamphlets, tourist brochures and discount coupons
- a restaurant list compiled by the organizing committee, listing both places close to the hotel (suitable for the Friday lunch, for which time is somewhat limited) and places further afield (suitable for a more leisurely dinner Friday and Saturday evening)
- pens, notepads, brochures and literature supplied by sponsors

#### **8.4. Introductions**

At the beginning of the opening plenary, it is customary for the President of OLAC to welcome the participants to the conference and to introduce the Chair / Co-Chairs. The Chair / Co-Chairs then add their own welcome, thank the sponsors, mention any important logistical points that need to be underlined, and introduce the keynote speaker.

At each workshop or session, a member of the Organizing Committee (or a member of the Executive Board or other suitable volunteer) thanks the session sponsor, if any, and briefly introduces the speaker or presenter. At the end of each workshop or session, the

introducer reminds the participants to fill out the applicable section of the conference evaluation questionnaire.

### **8.5. Evaluation Questionnaire**

Conference participants may receive evaluation questionnaires in the registration package. After each session, the introducer reminds the participants to fill in the part of the questionnaire corresponding to that session. At the end of the conference, participants are asked to fill in the remaining sections (i.e. those dealing with the conference as a whole) and to put the completed forms in the box provided for this purpose. The box should be kept at the registration / information desk all day Friday and Saturday, and near the door of the room in which the closing Sunday plenary is held.

Alternatively, a survey may be sent to attendees after the conference using a free or low-cost online survey service or software.

A sample evaluation questionnaire is included in the Appendix.

## **SECTION 9: Post-Conference Tasks**

- Collect and tabulate the evaluation questionnaires; prepare a conference report for the Executive Board which gives and analyzes the results and which transcribes all the comments
- Send thank-you letters from the Chair / Co-Chair to all speakers, workshop leaders, organizers, volunteers and sponsors
- Pay the hotel bill and all other outstanding bills; process and pay the stipend and honoraria payments due to the speakers and workshop leaders
- Prepare a financial report for the Executive Board
- Once all payments due have been settled, arrange to close the conference bank account and to transfer any leftover funds to the OLAC Treasurer
- In conjunction with the OLAC Conference Report Editor, make sure that the volunteer reporters send in their session reports for the OLAC Newsletter
- Arrange for the OLAC webmaster to edit the Conference page of the OLAC website so that the link to the conference website is replaced by a conference summary page that includes the conference session reports, as well as selected digital photographs sent in by conference participants
- Provide information to the OLAC Archivist.
- Send to the OLAC Archivist the conference documentation stipulated in the “Archives” section of the OLAC Handbook:
  - Minutes of Planning Committee meetings
  - Printed programs and intact sample conference packets
  - Participant lists
  - Individual session reports
  - Conference reports
  - Session handouts
  - Financial records
  - Contracts
  - Photographs
- Review the OLAC conference manual and forward any recommended changes or additions to the Executive Board
- Recommended: Arrange for the conference webmaster to copy the website to the most up-to-date digital memory storage feasibly available, and to send a copy to the OLAC Archivist, to the Conference Chair / Co-Chairs, and (once the location of the next conference has been decided) to the Chair / Co-Chairs of the next conference.

## APPENDIX A

### SAMPLE EVALUATION FORM, 2004

#### OLAC 2004 Conference Evaluation

Please fill out the following 2004 Conference evaluation form and drop it in the collection box before you leave.

By filling out the evaluation form, you give the Conference Committees information for the planning of future conferences. There are sections for comments/suggestions as well. Feel free to write additional comments on the back. All information is much appreciated. Thank you for your time.

Did the conference meet your expectations?  Yes  No

How useful was the information presented at this conference?  Very  Somewhat  Not very

The best thing I liked about the conference was ..... \_\_\_\_\_

\_\_\_\_\_

The thing I liked least at the conference was..... \_\_\_\_\_

\_\_\_\_\_

Please give your suggestions as to what improvements can be made for future conferences.....

\_\_\_\_\_

\_\_\_\_\_

What factor(s) most influenced your decision to attend the conference?  Workshop  Workshop  Presenters  Location  Cost  
Topics Language

Overall reaction of the conference:  Excellent  Good  Average  Fair  Poor

	Excellent	Good	Average	Fair	Poor	Not Attended
<b>Tours:</b>						
NFB CinéRobothèque	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bibliothèque Nationale du Québec	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>McCord Museum Reception</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Keynote Address / A. Carlyle</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Workshops:</b>						
Music Scores / R. Gagnon	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cartographic CD-ROMs / K. Jensen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Still and Moving Images / K. Kasirer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Oral Histories / M. Maguire	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Genre/Form Terms / R. Maxwell	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Future of the GMD / C. Oliver	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Videorecordings / J. Weitz	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Electronic Resources / L. Woodcock	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ressources Intégratrices / G. Fournier	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enregistrements Sonores Musicaux / D. Paradis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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<b>Showcase Sessions:</b>						
Bibliothèque Nationale du Québec / C. Fournier, L. Bédard, M. Laforce	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Library and Archives Canada / A. Draper	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Discussion Sessions:</b>						
OLAC Round Tables	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Birds of a Feather Session	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Panel on Cataloguing Education / L. Howarth, A. Carlyle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Question & Answer Panel / R. Freeborn, C. Oliver, J. Weitz, L. Woodcock	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Poster Presentations</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Closing Address</b> / G. Teasdale	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## APPENDIX B-1

### SAMPLE FUNDRAISING /SPONSORSHIP REQUEST EMAIL, 2008

Dear \_\_\_\_\_,

I'm the outreach coordinator for an professional librarians organization called OLAC, a group of media catalogers that is having a biannual conference in Cleveland, Ohio from September 26-28, 2008, together with a group of music librarians called Music OCLC Users Group (MOUG.) We're expecting about 240 attendees. The OLAC-MOUG conference website may be viewed at <http://www.notsl.org/olac-moug/home.htm>

I'm writing to ask if \_\_\_\_\_ would help to cover some of the expenses of our conference as a co-sponsor. We are particularly hoping to find co-sponsors for the training workshops that form the core of our conference program. Sponsors will be acknowledged at the sessions and on the conference materials and website.

Though we will not have exhibit booths, sponsors are encouraged to send us promotional or informational materials for display and distribution. I know many of our attendees would be interested in learning more about in Midwest's cataloging services and products.

A donation of half the cost of a session or meal would earn designation as a major sponsor.

For instance, a \$2200 donation would constitute major sponsorship of an all-conference break or breakfast.

\$1000 would be major sponsorship of the all-day pre-conference.

\$750 would pay for major sponsorship of one of our keynote or closing speakers.

\$500 would be major sponsorship of lunch at the pre-conference, and \$250 would sponsor a preconference break.

\$250 would be major sponsorship of one of our ten conference workshops.

Smaller donations will also be acknowledged on the website and program.

Other materials we are seeking are pens, notepads or notebooks, and tote bags.

OLAC, founded in 1980, provides a means for exchange of information, continuing education, and communication among catalogers and with the Library of Congress. The biannual conference offers advanced training workshops on cataloging audio-visual materials, electronic resources, music, maps, and other special formats, as well as general sessions on related topics. For more information about OLAC, please see the brochure at <http://ublib.buffalo.edu/libraries/units/cts/olac/brochure.pdf> .

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Please let me know if you have any questions. I look forward to hearing from you.

Best regards,

Deborah Benrubi  
Technical Services Librarian  
University of San Francisco  
Gleeson Library|Geschke Center  
2130 Fulton St.  
San Francisco, CA 94117

PHONE (415) 422-5672 / FAX (415) 422-2233  
EMAIL [benrubi@usfca.edu](mailto:benrubi@usfca.edu)

OLAC-MOUG 2008 Conference Fundraising Subcommittee Chair

## **APPENDIX B-2**

### **SAMPLE FUNDRAISING /SPONSORSHIP REQUEST LETTER, 2004**

Dear

I am pleased to announce that the 11th Biennial OLAC (Online Audiovisual Catalogers) conference will be held in Montreal on October 1-3, 2004. The conference website (<http://mavweb.mnsu.edu/bothmr/OLAC/>) has recently been launched, and will be updated periodically as planning for the conference moves forward. A list of the members of the Organizing Committee is provided on the site's main page (<http://mavweb.mnsu.edu/bothmr/OLAC/home.html>).

We are presently seeking sponsors who might wish to help cover some of the expenses of the conference, particularly the costs related to the training workshops that form the core of our conference programme. Sponsors will be acknowledged on the OLAC 2004 conference website, and a link to their website will be provided. Sponsors will also be acknowledged in the printed programme that will be included in the conference package given to each registrant. If a sponsor wishes to provide funding to support a specific session in the conference programme, and is able to cover an appreciable percentage of that session's costs (which mainly consist of speaker travel expenses, photocopying costs and audio-visual equipment fees), the conference website and programme will acknowledge this special sponsorship, as will the session convenor's opening remarks.

OLAC (<http://www.olacinc.org/>) was founded in 1980 to establish and maintain a group that could speak for catalogers of audiovisual materials. The organization provides a means for exchange of information, continuing education, and communication among catalogers and with the Library of Congress. OLAC holds a conference every two years, which offers advanced training workshops on cataloging audio-visual materials, electronic resources, music, maps and other special formats, as well as general sessions on related topics. A listing of previous conferences, with abstracts of many of the sessions, is available at:

<http://ublib.buffalo.edu/libraries/units/cts/olac/conferences/>

OLAC 2004 will be the first OLAC conference ever to take place outside of the United States. As such, it will provide an opportunity to increase OLAC's visibility among Canadian librarians and to allow American librarians to become better acquainted with the Canadian library community. The conference, whose theme is "Expanding Access: Connecting the Global Community to a Multitude of Formats," will feature both Canadian and American speakers, and will include a number of French-language sessions.

Although there are no exhibitor booths at OLAC conferences, we will have tables set up for pamphlets, brochures, bookmarks and other handouts, if any of our sponsors wish to send us such materials for distribution. In terms of numbers, OLAC conferences typically attract between 175 and 250 people. We expect that the registrants attending the conference will comprise both OLAC members -- most of whom are from the United States -- and non-members, including librarians from the Montreal area and the rest of the country. Our French-language sessions in particular will be aimed at attracting francophone or bilingual librarians who have never attended an OLAC conference before now.

Thank you for your kind consideration of this proposal. We would like to have our list of sponsors in place by January 2004, so we hope that we can hear from you within the next few weeks. Please feel free to contact me with any questions you may have, or if you require any additional information. I look forward to hearing from you.

Sincere regards,

Marc Richard  
Associate Librarian  
McGill University Libraries  
Montreal, Quebec, Canada  
(514) 398-3669

Co-Chair,  
OLAC 2004 Conference Organizing Committee