AMERICAN COLLEGE OF TRIAL LAWYERS

Guide to

Organizing a Fellows Dinner

October 2026

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Contents

Introduction 2
Defining the Purpose and Scope 3
Assigning Organizers 3
Liaising with the National Office 3
Finances 4
Event Attendees 5
Location Selection 5
Date/Timing 7
Speaker(s) 7
Promoting the Event and Managing RSVPs 8
Food and Beverage 8
Other Advance Arrangements 9
The Start of the Event 10
Sample Event Timeline 10
Post Event 11

Introduction

A Fellows dinner provides an opportunity to strengthen relationships among Fellows, welcome and engage new inductees, and build connections with colleagues who are advancing the College's mission. Local engagement is an important part of maintaining an active and connected Fellowship and is a priority of the College's strategic plan.

This guide provides practical recommendations for State or Province Committees planning a standalone Fellows dinner for their Chapter, including determining the format, selecting a venue, developing a budget, coordinating logistics and communicating with Fellows and guests. The dinner is intended to be a smaller, more informal gathering than a Regional Meeting or other large College event.

Defining the Purpose and Scope

- If the event is held annually or on some other regular schedule, the event organizer should make inquiries about the traditions of the State or Province (S/P) chapter, as Fellows who are accustomed to a certain type of event may prefer to keep those traditions going.
- If you are organizing a new event, clarify the objective: Is it for networking, professional development, and/or a celebratory function? Also, identify whether the event is meant to become a regular occurrence (Annual, Fall, Spring…).
- Determine the target audience (Fellows, Fellows & guests, other individuals in the legal or justice community).
- Determine the degree of formality (casual, business casual, business, black tie).
- Choose a target date range for the event. In doing this, consider coordinating with neighboring jurisdictions so that the President or other Executive Committee member can attend more than one event during a single trip. It may also be beneficial to schedule the event adjacent to other events that draw Fellows from around the chapter, such as an annual federal bar dinner, The Advocates' Society End of Term Dinner, ABOTA dinner, etc.
- These events often incorporate a host/emcee. Determine who on the S/P Committee or subcommittee will be responsible for fulfilling these duties.

Assigning Organizers

- You may consider appointing a small subcommittee to organize the event. Subcommittee members need not all be from the S/P Committee but the subcommittee should include at least one Committee member to serve as liaison.
- The subcommittee should meet regularly and maintain a shared document to track progress on each organizational element. Making the S/P Chair an ex officio member of the organizing subcommittee can also streamline communication.

Liaising with the National Office

There are several important reasons why National Office Meetings Department should be informed of the event as soon as possible:

- Typically, the President or a member of the Executive Committee will try to attend making it is necessary to coordinate the event date with the National Calendar.

- There are records of prior, similar events held in various locations and the National Office Meetings Department can help organizers access those resources during planning.
- If the event registration fee is collected by the National Office, the Meetings Department can handle the event registration process.
- The Meetings Department will prepare and send name badges for attendees.
- The Meetings Department can provide guidance in relation to vendor contracts.
- The Meetings Department can provide guidance on event finances.

Finances

Broadly speaking, there are three ways to price the event and collect the registration fee: (i) a fixed price covering all costs; (ii) a fixed price covering the meal and other fixed costs, with a cash bar; or (iii) each attendee paying his or her own bill at the Event. Realistically, the final option only works at a restaurant or club and can limit the organizer's ability to recover additional costs such as the rental of an AV system, speaker expenses, etc. Options (i) and (ii) have further details below.

The Event Subcommittee should make tentative food and beverage arrangements with the venue or caterer and obtain pricing (including taxes and gratuity). See the Food and Beverage section below for further detail. Estimated amounts for additional expenses such as décor, speaker expenses, signage, and AV rental also need to be determined in order to price the event for attendees. See the Location Selection section below.

Organizers should tentatively set the registration fee by adding the total forecasted expenses and estimating the number of attendees. Liaise with the National Office Meetings Department and previous State and Province Committee or Event Chairs to help confirm that the estimated attendee number and elements of the pricing are appropriate. The Meetings Department can be very helpful as it has rules of thumb for estimating various quantities based on past events and experience.

The National Office Meetings Department can also provide advice in relation to negotiating terms for payment to the vendor(s) involved. The venue will typically prepare and send Event Orders (EOs) that lists all of the agreed-upon costs and often includes a minimum spend amount. Someone from the Event Subcommittee or the S/P Committee will have to sign the EO as a contract. A downpayment will often be required, usually a percentage of the EO estimate. After the Event, a final bill will be sent for the remaining balance. The per person

food expense is relatively set with the EO pricing but the final bill can vary significantly depending on beverage consumption by attendees.

The registration cost for Public Service Fellows can be reduced through a program administered by the National Office.

Since the final registration fee cannot be set until the number of attendees is known, organizers may need to pay deposits or other fixed costs in advance. Those costs can be reimbursed from registration fees once they are collected. If event costs are not due until after the event, they can be paid directly from the registration fees collected. If registration is processed through the National Office, a 3% credit card processing fee will apply and should be included in the registration fee.

If the State Committee hosting the event has a bank account and the National Office collects registration fees, the National Office will typically transfer the total collected to the State Committee's account after the event so that event-related expenses can be paid. **Only State Committees currently have bank accounts; Province Committees do not.** If the State Committee does not have a bank account, the organizers may be able to make a one-time arrangement with the National Office. Otherwise, organizers may independently collect registration fees, pay event expenses, and arrange for reimbursement.

Event Attendees

- Determine first whether the event will be for Fellows only, or Fellows and their guest (usually one guest per Fellow).
- Nominees for Fellowship who have been approved by the Board (including approval of their Statements of Qualifications), but who have not yet been inducted, may be included.
- If the event includes an award or celebration, consider inviting family, friends and colleagues of the person being recognized.
- Consider whether others from the legal and/or justice community will be invited (and who will pay for the legal and/or justice community attendees).

Location Selection

To be coordinated with Date/Timing section below.

- Try to identify and reserve the venue for the event at least 6 months in advance. If the event will occur during a holiday season, you may need to reserve a year in advance.

- You need to have a general idea of the number of attendees in order to select an appropriately sized venue.
- You should also determine how attendees will pay and confirm that the selected venue can accommodate the selected payment method, for example a group charge or electronic payment.

  Common venue choices are:

  (i) a restaurant (usually there is a minimum spend for the space);

  (ii) a hotel (usually there is a room rental cost in addition to other expenses);

  (iii) a private club; or

  (iv) a public space such as an art gallery or museum.
- If there are going to be speakers, it is best to have a private space at whatever venue is selected.
- Confirm that the venue can provide any necessary podium or AV equipment.
- If not, you will need to arrange for rental, delivery, return and billing, or borrow the equipment

  AV considerations:

  (i) microphone (handheld or lapel);

  (ii) small speaker system (if needed);

  (iii) podium or standing table;

  (iv) projector or screen (if applicable).
- You should also ask about available layouts given the anticipated number of attendees. Consider sightlines for the speaker and ensure that speakers are not competing with kitchen or bar noise during the event.
- Determine whether the venue has any décor options or has preferred vendors (florists, lighting, etc.).
- If your event is on a weekday, the proximity of the venue to the attendees' workplace locations will affect the start time.
- Be sure to consider accessibility issues.

Date/Timing

To be coordinated with Location Selection section above.

- Providing Fellows with as much advance notice of an event as possible is the best way to ensure a high attendance rate.
- Events can be held on weekdays or weekends; some Chapters choose to hold more casual Fellow lunches mid-week, while others opt for weekend evening events. Whichever date/time is selected, try to avoid scheduling on holiday weekends, religious holidays or school breaks as many people may be unavailable. Summer dates can also be a challenge.
- Because collegiality is a cornerstone of the College, time should be scheduled for a pre-dinner reception, generally around 60 minutes.
- Before finalizing contracts or confirming dates with vendors, confirm with the National Office Meetings Department that there are no College conflicts with your selected date.

Speaker(s)

- A member of the organizing subcommittee or the S/P Chair should plan to be the emcee, provide brief welcoming remarks and introduce the ACTL President (or member of the Executive Committee) in attendance.
- The ACTL President (or member of the Executive Committee) may give brief remarks.
- If the event includes a keynote speaker, identify and secure an appropriate choice, ensuring the topic aligns with ACTL principles. Common choices are judges, authors, academics, newsmakers and community leaders.
- Consider whether you need a separate introducer for the keynote speaker and secure that person's attendance as well.
- Agree on terms with the speaker(s): Discuss expense reimbursement, event date and timing, presentation length, format (speech, Q&A, etc.), AV needs, and dietary requirements.
- Collect any promotional materials (bio, headshot).

Promoting the Event and Managing RSVPs

- Send notice of the Event by as many methods as possible (include the date, time, location, speaker name/topic, dress code), organizers are strongly encouraged to use the ACTL Gaggle listserv.
- Encourage early registration.
- If registration is being processed through the National Office, the Event Subcommittee will need to supply all information to the Meetings Department using a form they can provide.
- Set a registration deadline that aligns with the venue or caterer's final headcount deadline. Make clear that registrations are nonrefundable after that date because organizers are responsible for the full cost based on final headcount.
- Track dietary needs and allergies:
    - Communicate these clearly to the venue/caterer.
    - If registration is being processed by the National Office Meetings Department, this information will be tracked for you.
- Send reminders to register leading up to the deadline.
- Send a reminder with any "Know Before You Go" information to registered attendees 2–3 days before the event.

Food and Beverage

Requirements vary by venue and may require significant coordination with the venue or caterer. Start early to avoid last-minute issues.

- A key decision for catered dinners is whether to use buffet or plated service. Buffets can shorten the meal but may be more expensive, are generally less formal and can generally make it more difficult to incorporate a keynote speaker.
- At a restaurant, guests may choose from the full menu or, more commonly, from a limited selection of courses for a fixed price. Beverages are typically charged separately on consumption, whether selected from the full or limited menu.
- Hotels typically offer banquet menus with a limited number of meal choices, which must be selected several days prior to the event and incorporated into the RSVP process. Hotels

can also accommodate hosted or cash bars, although some may require pre-selection of wines to be offered.

- Private clubs typically have their own food and beverage processes for banquets; consult with the club's management early.
- Public venues often have exclusive arrangements with third-party caterers, whose services are generally similar to those offered by hotels. If you must select your own caterer, confirm that it can supply all necessary items such as dishes, glasses and table linens, or you will need to arrange for those items separately.
- Select hors d'oeuvres for the reception and be sure to include that cost in the final registration price.

All venues and caterers can typically accommodate dietary restrictions but asking about them as part of the RSVP or registration process is the best practice.

Other Advance Arrangements

- Confirm that the organizers can arrive well before the start of the event.
- Advise the National Office Meetings Department where to send name badges and ensure someone is assigned to bring the badges to the event.
- Assign one subcommittee member to liaise/host the ACTL President and guest (or the Executive Committee attendee) and one to host the Keynote speaker.
- Confirm overall table layout with the venue.
- Arrange for a registration table at the entrance to the event where attendees will check in and pick up their name badges.
- Assign seating at the head table for the ACTL President (or Executive Committee member) and guest, the Keynote speaker, the emcee, and others (and advise those who are assigned to the head table of that fact).
- If not done by the venue or caterer, arrange for delivery/placement of décor on tables or elsewhere in the event space.
- Assign guests to tables other than the head table (if applicable).
- Decide whether to have background music at the reception or dinner (or both).
- Coordinate AV and "run of show" logistics.

- Prepare on-site materials:
    - printed agenda or program (optional)
    - signage outside the venue (optional)
    - seating plan or place cards (if assigned seating)
- Prepare a thank you gift or card for the speaker.

The Start of the Event

- The Event Subcommittee should arrive early.
- Assign someone to meet the manager of the event for the venue or caterer.
- Reconfirm dinner/speaker timing with the venue or caterer's event manager.
- Test the AV equipment before the guests arrive.
- Ensure table layout (particularly head table) is as planned.
- Place signage: Welcome sign, table assignments and/or table markers.

Sample Event Timeline

(Assumes keynote speaker is after dinner)

5:30 – 6:00 p.m. Pre-event setup/Event Subcommittee arrival

6:00 – 7:00 p.m. Reception (60 minutes)

- Around 6:50 p.m., venue staff should signal that seating for dinner will begin shortly

7:00 – 7:10 p.m. Welcome & opening remarks

- Host/emcee welcomes attendees and recognizes special guests
- Housekeeping notes/brief overview of evening flow
- Host welcomes ACTL President (or Executive Committee member) to speak

7:10 – 7:45 p.m. First and second course service

7:45 – 7:50 p.m. Keynote speaker introduction (2–3 minutes) and transition to keynote

7:50 – 8:15 p.m. Keynote address/Q&A

8:15 – 8:20 p.m. Thank you & closing remarks

- Presentation of gift or formal acknowledgment (if applicable)

8:20 – 9:00 p.m. Dessert & informal close

- Dessert, coffee, and tea served
- Informal networking

Post Event

- If the National Office did not handle registration, be sure to collect any outstanding registration fees.
- Settle the bill(s) with the venue and vendors and/or reimburse any prepayments from the registration revenue.
- Return name badges to the National Office.
- Send thank-you notes to the speaker and venue.
- Share any promised materials with attendees.
- Gather feedback for future events.