AMERICAN COLLEGE OF TRIAL LAWYERS

Guide to

Organizing a Regional Meeting

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Introduction

Regional Meetings provide an opportunity for Fellows, spouses and guests to connect with one another and participate in professional development programs. Fellows have expressed strong support for local engagement, and Regional Meetings are an effective way to advance that objective.

A Regional Meeting generally includes Fellows and their spouses or guests from all the states and/or provinces within a region. Regions may also choose to hold joint Regional Meetings or invite Fellows from states or provinces outside their Region to participate.

States and provinces are encouraged to host Regional Meetings on a regular basis. In many regions, the site of the meeting can be rotated among the States and Provinces, providing an opportunity for different State or Provinces Committees to host.

This Guide outlines the steps a State or Province (S/P) Committee should consider when organizing a Regional Meeting. It should be used in conjunction with the *Regional Meeting Planning Guide*, a checklist provided by the Meetings Department at the National Office.

Purpose of the Regional Meeting

Regional Meetings serve to foster local engagement of Fellows within the Region on occasions other than Annual or Spring Meetings of the entire College.

Regional Meetings are places where Fellows and spouses can re-connect with their colleagues and friends and meet new Fellows in a smaller setting. Also, Regional Meetings are platforms for interesting professional development sessions and can serve as proving grounds for speakers who may present topics at Annual and Spring Meetings.

The objectives of a Regional Meeting are best achieved through strong efforts to attract Fellows to the event and careful planning to ensure the event is a financial success.

If CLE credit is to be offered, the appropriate approvals must be obtained in advance by the host committee, and the cost of filings should be added to the budget.

Establishing a Regional Meeting Organizing Committee

Regional Meetings are organized locally by S/P Committees working together. One S/P Committee acts as the host of the meeting and takes the lead in organizing the event and working with the National Office Meetings Department on areas within its mandate.

The first step in planning a Regional Meeting should be to create a Regional Meeting Planning Subcommittee. The Subcommittee should include representatives from the S/P Committees throughout the Region, including the host S/P Committee Chair or Vice Chair and senior representatives of the other S/P Committees in the region. The host S/P Committee should name the Planning Subcommittee Chair. The Subcommittee can include Fellows at large from the host state or province chapter. There are no limits on the number of Planning Subcommittee Members, but it should include sufficient representation from each S/P Committee in the region to ensure effective coordination. The Regent should be involved at the outset and copied on all correspondence.

Planning a successful Regional Meetings requires significant coordination and follow-through. The Planning Subcommittee should identify enough members to delegate the various responsibilities outlined in this guide. Meetings should be held at least monthly, then biweekly and weekly as the date for the event approaches.

These meetings involve a financial commitment by the Region and great care should be taken in planning and budgeting. If there is a shortfall, the Region will need to cover it.

The Subcommittee should keep minutes and maintain a shared task list or spreadsheet identifying the person responsible for each task and its status. This will help ensure that responsibilities are clear and that important deadlines and follow-up items are not overlooked.

The Subcommittee should consult with the National Office Meetings Department and the Regent throughout the planning process.

The Role of the National Office

The College's National Office Meetings Department plays an important role in the planning and organization of Regional Meetings.

First, the Meetings Department is a liaison for communicating with Fellows. State and Province leaders should use multiple channels of communication to promote and discuss the Regional Meeting, including the Gaggle Listserv provided by the College and their own personal communication tools.

Second, the Meetings Department has records of previous Regional Meetings and can provide important historical data about when and where meetings took place. This is helpful in estimating numbers of registrants and budgeting. The Meetings Department can also assist in preparing forecasts for registration numbers, developing budgets and negotiating venue hotel rooms and food and beverage contracts. Further details on this are provided below.

Third, the Meetings Department will coordinate the attendance of the President or other Executive Committee member.

Finally, the Meetings Department will provide name badges for registrants in advance of the Regional Meeting, logos for meeting agendas and assist with key communications.

Below is a more detailed list of services provided by the National Office Meetings Department:

1. Provide past Regional Meeting information.
2. Provide templates for save-the-date, registration form, budgets and schedules.
3. Share Fellows' contact lists.
4. Email meeting information blasts to all Fellows in the region.
5. Process meeting online meeting registrations.
6. Collect payments for registration fees.
7. Create and send name badges for registered Fellows and guests.
8. Provide printed meeting materials and ship in blue College logo folders.
9. Provide periodic payments of collected meeting revenue to Chair as needed throughout the registration process for meeting reimbursements if paid directly by the Chair to venues and suppliers. It is preferable to arrange for payments to be made by the National Office if feasible, rather than seeking reimbursement.
10. Upon conclusion: return all revenue to the State or Province Committee (for those that have a bank account) or hold revenue in the name of the State or Province Committee (for those that do not) less:
    (a) ACTL's initial hotel deposits at contract signing and final payments to hotel at meeting conclusion.
    (b) ACTL's fees incurred for credit card processing of registration fees.
    (c) Shipping costs for meeting materials.

Setting a Date

Several factors influence the choice of a date for a Regional Meeting. It is recommended that you start planning at least 12–18 months before the event is to take place.

To select a date, start with the National Office Meetings Department which keeps a calendar of College events. The Regional Meeting should not conflict with the College's Annual or Spring Meeting, or with regularly scheduled State and Province meetings or retreats. It is also important to avoid important holidays or local Bar events as this affects attendance. The Meetings Department can provide insight into other scheduling considerations.

Each Region has a set of months when it historically holds its Regional Meeting, and it is recommended that this pattern be continued. The Meetings Department will have provided that history at the beginning of the planning process.

Selecting a Location

The best location for a Regional Meeting is one that will accommodate the number of registered attendees and achieves the goals of the organizers. Some Regional Meetings are held in resort properties while others choose hotels. At a minimum, the location should have high-quality accommodations, excellent catering, well-appointed conference meeting rooms and the right AV equipment and staff. It is important that the location can accommodate Fellows with mobility issues.

Choosing the right location starts with estimating the correct number of registrants. The Meetings Department and S/P Committees will have historic data to make a reasonable estimate of the number of registrants to be expected. When the Meetings Department negotiates a hotel contract, they will consider the number of local Fellows, as most local Fellows will not require hotel rooms.

Besides the quality of the location, organizers should consider the cost of different locations. College Fellows expect quality and are willing to pay for it, within reason. The Meetings Department will assist with scouting locations and negotiating the best contracts. Once dates and potential hotels are identified by the Planning Subcommittee, the Meetings Department will seek RFPs (Requests For Proposal) from the potential locations. The Executive Director must sign all hotel contracts and the National Office will advance the required deposit(s).

Site visits by at least one Planning Subcommittee member to the locations under consideration are advisable.

If a hotel is not being used as the meeting location, reservations of a block of rooms at a hotel near the event venue should be made at least 6 months before the event.

Who is Invited to Attend?

Regional Meetings are open to all Fellows, including retirees and Judicial Fellows and their spouses or guests. Lawyers who have been invited to join the College (those who have been approved by the Board of Regents, submitted their Statement of Qualifications, and received a formal invitation to be inducted) may be invited to attend as well.

It is important to always request a current email contact list from the National Office if using email to promote the meeting in addition to your Chapter's Gaggle listserv or in addition to emails sent from the National Office.

Local judicial or justice system leaders can be invited to participate as speakers, including with spouses or guests. Often a dignitary will attend and welcome participants in the event. Speakers and their guests attend as well. The cost of these participants is born by the Fellows as part of the event fees. The College does not have a separate budget to pay for speakers.

Involvement of Executive Committee Members

Either the President or another member of the Executive Committee (EC) will attend a Regional Meeting as a representative of the College. The EC member attending should be listed on the Agenda and can provide remarks at a dinner, or at the beginning or closing of the meeting. The President or other EC member should be introduced by the Planning Subcommittee Chair or S/P Committee Chair.

How to Set a Budget and Organize the Finances

The National Office Meetings Department relies on a pro forma budget spreadsheet to model the finances for the Regional Meeting. At a high level, the budget starts with a forecast of the number of registrants expected to attend the Regional Meeting. Registrant fees are the main source of revenue. Sponsorship payments from law firms or vendors is another option for revenue to fund the event.

The number of registrants is estimated based on past Regional Meetings and canvassing of State and Province Chairs and committee members. Make sure that past meetings in the hosting state or province are the baseline, since there are different attendance rates among states and provinces within a region.

Broadly speaking, expenses for a Regional Meeting break down as follows:

- For a full weekend with a Thursday start: Food and drinks for two breakfasts, coffee for two days in General Session, three receptions and at least two dinners. Some Regional Meetings begin on Friday, so numbers would be adjusted accordingly.
- Speaker expenses, including hotel rooms and travel. Speakers for these events are not compensated for their participation other than by covering their expenses, unless the Planning Subcommittee raises funds specifically for compensation.
- Audio Visual: microphones and a lectern for two days of General Session speakers and panels, screens and projectors. Wi-Fi fees may apply, depending on concessions secured in the hotel/venue contract.
- Location fees for off-site receptions, including costs for transportation, location rental and caterers, food and beverage, silverware, linens, and tables if not included.
- Cost of approval for CLE programming credit
- Event planner: the Meetings Department participates in this role in pre-planning and during the planning process. Options can be discussed for additional help. Often, a Fellow's firm can assist with event planning (this is optional and perhaps not needed if the event takes place at a hotel or resort that is accustomed to hosting events).
- Floral centerpieces and music (optional and subject to budget issues)
- Gifts for speakers and other special guests (optional and subject to budget issues)

Regional Meetings may include an activity or tours, but these are extras paid for by each person at registration and must be planned well in advance of opening registration. If such activities or tours are not provided, Fellows can be encouraged to arrange for their own small group activities with other registered Fellows.

The registration price is set after you calculate meeting expenses. Once those are gathered, divide the total by the number of Fellows and guests forecasted to attend. The Meetings Department can provide a formatted Excel spreadsheet to assist with these calculations. As costs become more certain, the National Office can help review the budget and adjust individual expenses as needed.

The Meetings Department will negotiate contracts with hotel or resort destinations. This includes negotiating room reservations, the provision of food and beverages, and AV equipment. The National Office will also facilitate the payment of deposits and reconciliation of final payments. Sample contracts negotiated by the National Office are available for review.

Meeting Registration should be set up through the National Office.

CLE Credit

If you want to provide CLE credit, you will need to contact your state bar association for requirements. Often state bar associations require you to have a CLE provider account. If you have not already obtained an account, the National Office Meetings Department may have an account that you can use to register your event. If you provide CLE, you will probably need to have sign-in sheets for attendees, which will need to be kept for proof of attendance. Some state bar associations will allow the lawyer to self-report their attendance, while others may require the CLE provider to report attendance.

You should be able to arrange for one or more of your Fellows to make a presentation. If you invite a non-Fellow to speak, the College's policy is to cover transportation and hotel expenses, and these will need to be factored into your budget.

Sponsorships

Although not required, sponsorships are a good way to raise additional revenue and to provide a financial cushion in case registrations do not match forecasts.

There are two sources of sponsorship revenue: law firms or vendors.

The amount paid by sponsors varies, and some sponsors have paid as much as $5000.

Sponsors are recognized in posters and signs and in printed materials distributed at the event and acknowledged in opening and closing remarks. The Planning Subcommittee must create and arrange for the production and display of such signs. This expense must be included in the creation of the meeting budget.

Setting the Agenda

Regional Meetings are similar in structure to Annual and Spring Meetings of the College. The agenda includes a combination of social events, optional activities and general sessions where speakers address legal and non-legal topics.

A typical agenda starts with a welcome reception and includes one seated dinner and one or two days of programming.

Samples of some recent agendas are attached.

Finding Speakers

Regional Meetings commonly include a combination of speakers on legal topics and matters of general interest. Possible speakers can be found in the host state or province, or within the region.

Once the meeting date is announced, ask Fellows to suggest speakers. Fellows have wide connections and sometimes those same Fellows can serve as an initial contact with a speaker.

Local colleges and universities are also good places to find speakers. There is no shortage of interesting authors, community activists, judges, politicians, government and military leaders who have made Regional Meetings a success. Key local historical events or locations of interest can be a useful focus of topics as well.

Regional Meetings can have a theme, and the speakers can be chosen around that theme. There is no prohibition on paying speakers a fee, but the overall cost for Fellows to attend rises significantly if large fees are paid to more than one speaker.

Highly sought-after speakers often have limited availability, so early outreach is important to avoid last-minute scheduling challenges. It is recommended that you confirm speakers at least six months in advance. Care should also be given to achieving balance and diversity among speakers.

Speakers may require specific conditions concerning use of their materials and rebroadcast of their talks. Ensure all such conditions are observed.

Communications With Fellows About the Regional Meeting

Regional Meeting Planning Subcommittee Chairs and S/P Committee Chairs should announce the date and location of the meeting as soon as possible once the venue contract is signed.

There are three major communication milestones. The National Office Meetings Department will assist with executing these, and they should be supplemented by each Chapter in the Region using their Gaggle listserv.

1. First, a “save the date” message should be emailed as soon as possible and at least six months in advance of the meeting.
2. Fellows are contacted again to announce registration, pricing and any other details that encourage attendance such as speakers and activities.

3. Reminder messages should be sent as frequently as needed, depending on registration numbers.

An event page on the College's website will also be set up and can provide Fellows with details about the location, agenda and link to registration.

Managing the Registration Process

Registration for Regional Meetings is managed by the National Office Meetings Department. Fellows can register for the meeting on the College's website and obtain information about reserving hotel rooms and other activities.

The Regent, S/P Chairs and Fellows in the Region are encouraged to promote the event through their own personal communication channels, highlighting the program, location and any other unique features of the event.

Meeting Logistics and Dress Code

The Planning Subcommittee should provide Fellows and guests with clear information about the meeting schedule, locations, dress code and other details. The agenda should outline the schedule of events and include a welcome letter and speaker biographies.

A registration table should be established and staffed throughout the appropriate portions of the meeting. Name badges and other meeting materials should be available for pickup at registration.

Consider providing attendees with a list of recommended restaurants, local attractions and other points of interest. For meetings held at a hotel or resort, confirm that the venue will provide a dedicated Wi-Fi code for meeting attendees (include this provision in the hotel contract).

Dress codes should be specified for each event. General sessions are typically business casual, or resort wear when the meeting is held at a resort. Cocktail receptions and dinners may range from smart casual to more formal business attire. If there are specific expectations regarding denim, outdoor events or footwear, those should be communicated in advance. Attendees should also be advised of any clothing or equipment needed for planned activities.

Food and Beverages

Fellows are accustomed to excellent food and beverage offerings at events, and Regional Meetings should seek to meet those high standards.

There are three main occasions to consider regarding food and beverages:

1. Opening Reception
2. Breakfast and Coffee Breaks
3. Dinners

You will need to make preliminary decisions on food and beverage both to prepare your budget and to make sure you will meet the food and beverage minimum in your contract. The venue can provide menus with pricing for your consideration. If you are preparing your budget a year in advance, it is possible prices could change by the time of the event; ask the venue to lock in their prices to protect against price increases. The National Office Meetings Department will assist in contract negotiation.

For all events that include food and beverages on your agenda, you will be asked to provide a headcount. There will be an initial headcount in the contract and EOs that are negotiated up front, with a final headcount deadline usually a week or two before the event. For events such as welcome receptions, breakfasts, and any food or drink scheduled during meetings, you should estimate on the low side because not everyone will attend, and many people will not eat. If you have a plated dinner with entrée options, you will need to provide a more exact number for each entrée option.

If you hold a welcome reception, you must decide whether to have a hosted bar, where the venue track the number of drinks served and bills you afterwards; or a cash bar, where guests pay for their own drinks. You will also need to decide what beverages will be available, including wine and alcohol. For food, you will need to choose between passed hors d'oeuvres or a self-service buffet. Passed hors d'oeuvres is usually the less expensive choice.

For breakfasts, the venue will usually have options for buffet tables that range from a continental breakfast of pastries and fruit, to eggs and more elaborate options. For budgeting, you can expect that not everyone that registers will actually partake. You might give a headcount to the venue that is 10-15% fewer than the total number of registrants.

For dinners, most venues will allow you to select two or three entrée options. It is best to get entrée selections from the attendees as part of the registration process. You will also need to decide whether to serve wine, and make a selection of both a white and a red. The final invoice will charge you for the total numbers of bottles opened.

If the location permits, off-site locations for dinner can be a fun way to mix things up and allow attendees to experience the location.

If the event is more than two days long, participants may wish to have a night on their own and make their own plans. In that case, participants should be provided with a list of restaurant options.

Audio-Visual Equipment

AV equipment suitable for the venue is required. The host hotel should have all equipment needed or a preferred vendor they will refer you to use. The National Office Meetings Department will negotiate these costs with the hotel and they will be added to the final hotel bill. If a speaker requires something unusual, this should be addressed as early as possible.

Plan ahead by confirming speakers' audiovisual and presentation requirements in advance, as the hotel or resort can typically provide day-of technical support only when the necessary equipment and services have been arranged in advance.

Recording the Meeting

If the Planning Subcommittee wishes to record general session presentations for sharing on the College's YouTube channel, it must obtain permission from each speaker before recording. The National Office can provide a speaker release form for this purpose. Any recording services and associated costs should be included in the meeting budget.

A recap of the Regional Meeting is typically included in the College's *Journal.* It is recommended that the Planning Subcommittee designate a member to prepare the *Journal* article and take a few photographs during the meeting for possible inclusion.

On-Site Signage

Signs should be prepared for the location of meeting rooms and other activities at the Regional Meeting. These can be placed on easels provided by the host hotel or resort to direct Fellows to correct location. Custom printed signs need to be included in the budget, or you may rely on the venue to provide signage. Signage choices should be communicated to the hotel during the planning process. If additional signs are needed, for things such as thanking sponsors, this is an additional expense and will need to be budgeted accordingly.

Post-Event Steps

After the event is concluded, the Planning Subcommittee should settle accounts with the venue, vendors and if necessary, speaker reimbursements. The National Office Meetings

Department will provide reports on revenue collected and assist with payments before returning any profit from the registration revenue back to the S/P Committee account.

Submit any necessary CLE paperwork.

The Planning Subcommittee should send thank you notes to speakers, special guests and to the host hotel or resort. If any speaker presentation materials should be distributed, it can be made available to Fellows after the Regional Meeting concludes.

Finally, Return the name badges to the National Office and provide any feedback that could be helpful for planning a Regional Meeting in the future.