

NCLA Conference Handbook

A. Biennial Conference Purpose

The biennial conference of the North Carolina Library Association furthers the purpose of the Association, which are to promote libraries, library and information services, and librarianship, and to champion intellectual freedom and literacy programs. It provides a forum for discussing library-related issues and opportunities for professional growth. The conference supports both formal and informal networks of libraries and librarians and helps the profession identify and resolve special concerns of minorities and women in the profession.

In addition, the biennial conference provides *revenue* for the Association. Distribution of conference revenue is determined by the Executive Board upon recommendations from the Finance Committee. The biennial conference provides opportunities for *continuing education*. Programs and exhibits provide information about new concepts, new services, and new products. Library personnel in the state have opportunities to make presentations in their areas of expertise.

The biennial conference provides opportunities for *networking*. Whether participants are gathering around a snack area, waiting to talk to an exhibitor or for a meeting to start, or attending a meal function, they will meet and talk with others whom they will find interesting and helpful.

The biennial conference provides opportunities for *promotion of the profession* through publicity, outreach and community interest.

Pre-Conferences

Pre-conferences offer opportunities for constituent and related external organizations to present topics of interest to the profession in more intensive, in-depth session than are offered during the conference.

External groups must cover the facility cost for their session. This can be done by requiring participants to be registered for the conference or by paying a session fee established by the conference committee.

Pre-conference activities are coordinated by the Conference Committee and pre-conference bills are paid by the conference treasurer. Profits from pre-conferences are divided as follows:

NCLA sections and committees : 25% (conference) 75% (sponsoring group)
non NCLA affiliated groups: 50% (conference) 50% (sponsoring group)

B. Conference Committee

Successful conference planning requires creativity, professionalism, thoroughness and organization, foresight, patience, and a sense of humor. It is a rewarding challenge.

The Conference Committee has responsibility for the biennial conference and should be representative of the Association. Membership of the committee should reflect the diversity of the membership in terms of types of libraries represented, employment categories, regions of the State, ethnic background, and gender of members.

The Chair of the Conference Committee, the NCLA Vice-President/President Elect, is responsible for choosing and organizing a group to plan and oversee the conference. The Chair is also responsible for monitoring the work of the Conference Committee and its subcommittees while working closely with chairs of sections and committees of NCLA.

Elements of the organizational structure may include, but are not limited to, site selection, program planning, exhibits, registration, publicity, finance, local arrangements, etc. Ex officio members of the committee include the NCLA President, Treasurer-Elect, and a representative from the Web & Technologies Support Committee. A secretary may be recruited to take minutes for meetings.

The Chair of the Conference Committee reports to the NCLA Executive Board on a quarterly basis. The Executive Board is responsible for approving site for future conferences, theme and logo for the conference, and all registration rates and fees, including exhibitor fees. The status of the conference plans and conference finances should be a part of each report by the Chair to the Executive Board.

C. Site Selection

In selecting a site for the NCLA Biennial Conferences, historically the Association looks first at the three things identified by ALA's Chapters in a 1988 survey: meeting facilities, location and cost. To elaborate, we must determine:

1. Are the conference facilities contained in one easily accessible area? Do the meeting rooms meet our needs, including number and size? Is exhibit space adequate and easily accessible? Are all the above inviting to attendees? Are all facilities fully ADA accessible?
2. Is the location centrally located and accessible by car to all members? Many members choose to drive to the conference for one day only. Will the location afford attendees safety? Can the participants afford to attend; and will NCLA make money? The two are interrelated. Cost of meeting facilities is critical. Will the local convention bureau arrange a beneficial financial package? Are caterers reasonable and competent? Are hotel rates reasonable, will NCLA benefit from the hotel package, and will attendees stay at conference hotels?

These three major criteria will play the largest part in site selection, but in addition, the Association needs to consider, in general order of importance:

- Historically, how easy has the local convention & visitors bureau been to work with? Are they flexible?
- How much hotel space is available within a reasonable distance of the conference?
- For those driving in, conference/convention center should have ample parking.

- Are dates available which meet the Association's needs? Historically, the Biennial Conference has been held during October or early November of odd calendar years. Conferences begin on Wednesday morning and finish Friday afternoon, but allowances must be made for set-up and pre-conferences on Tuesday.
- Historically, how supportive have the local libraries been? Their cooperation is general is helpful and parties or socials sponsored by local libraries have often made past conferences more appealing.
- Does the location offer restaurants, shopping, cultural and historical sites, libraries et al., that would be of possible interest to attendees? Are these within a reasonable distance of the hotels/convention center?
- Have we been equitable in locating conferences in various parts of the state?
- Can overall costs be reduced by negotiating for more than one conference, either in conjunction with NCSLMA or other associations or for biennial conferences?

The Site Selection Committee for the Executive Board is appointed by the President-Elect. The committee should use as many of the above criteria as possible in preparing a list of sites, while realizing that no site can meet every need.

The Site Selection Committee should begin negotiations as early as possible and offer the Executive Board a number of options early enough that they may make an informed decision without being rushed. It is also incumbent upon the site selection committee to be aware of the recent financial health of both the conference and the association in order to pursue options best suited to the association's financial needs.

D. Exhibits

Exhibits are an important component of each NCLA Conference. The inclusion of exhibits provides an opportunity for librarians, vendors and company representatives to meet and exchange information and concerns. In view of the increasing use of telephone contacts, these face-to-face meetings become even more important. Exhibits offer librarians a chance to examine and to evaluate new titles, products and services. In addition, the fees charged to exhibit booths are a significant part of the Conference income.

The Exhibits Committee should make every effort to compile and maintain a mailing list, which includes companies whose products and services will appeal to all types of libraries and librarians. Exhibitors should include both established and emerging companies.

The selection of a vendor may, to some extent, be determined by the Conference location. Some sites will have their own decorating staff; at other sites, it will be necessary to contract with an outside decorator or exhibit service. It is important to identify a vendor who can be flexible and who will be on-site throughout the Conference. The vendor or the Conference site staff should be prepared to handle pre-Conference shipment and to assist with shipping when exhibits close.

Booth layout will be planned by the decorator and may be influenced by the exhibit facility's structural features. Booths should be one standard size but should allow for doubling or tripling.

Booth assignments are made by the Exhibits chair as the reservation payment is received. Companies who respond early are usually assigned the choice locations. Traditionally, the Exhibits Committee has tried to avoid placing competitors in near-by booths.

The exhibit hall layout and a list of exhibitors should be included in the Conference materials.

Each booth should include signs with the company name and the booth number. Booth numbers are crucial and should be a separate sign since some exhibitors will use their own company banners. The layout, an exhibitor list, and booth signs make it possible to find companies with a minimum of confusion and inconvenience. All representatives should have standard Conference name tags provided by the Registration committee.

Because many companies will be using expensive equipment, security and equipment are important concerns – both for the exhibitors and the Association. The exhibit hall should be secure (guarded, if necessary) 24 hours a day and either the Conference facility or the Association should have adequate insurance coverage in effect.

The primary concern in planning exhibits should be bringing librarians and vendors together. Unfortunately, the scheduling of the Conference programs rarely allows free time to visit the exhibits. Therefore, plans should be made which will encourage visits to the exhibit hall. Extended hours on the first day of exhibits provide a good opportunity to browse when there are no other scheduled programs or meetings. Serving early morning coffee or afternoon soft drinks in the exhibit hall is another way to encourage people to attend the exhibits.

Exhibit passes should be available for people who are not registered for the Conference. Allowing the public to attend exhibits provides an excellent opportunity for out-reach and publicity.

E. Finances/Conference Treasurer

The conference treasurer (NCLA Treasurer-Elect) has two major responsibilities with respect to the biennial conference: budgeting and general accounting.

The budget process is a function based on historical information from past conferences, which provides a plan of spending for each area of conference responsibility. It is a basic financial blueprint from which local arrangements, the placement center, exhibits, etc., can plan their specific areas of the conference with the amount of dollars available.

The purpose of the general accounting function is to inform the various planning participants about their progress relating to the initial budget and to inform the Board of NCLA, through the NCLA treasurer, whether the conference is projected and/or has been a financial success. General accounting functions should be conducted according to general accounting principles.

A further purpose of general accounting is to keep the NCLA treasure informed regarding revenues and expenditure for purposes of reporting this information within the organization's tax return and financial statements, which are audited.

F. Program

The Program Committee for the NCLA Biennial Conference is responsible for planning the three General Sessions as well as working with the NCLA Biennial Conference program planners designated by the various NCLA committees and sections. The Chair of the Program Committee is a member of the Executive Board of the Conference Committee

Programs are planned with the needs of the NCLA membership foremost, but also to attract non-NCLA affiliated groups with an educational focus.

The Program Chair must make all contacts with the program planners of all NCLA committees

and sections. A list of these is in the *NCLA Handbook*.

Non-NCLA affiliated groups which have been included in the past are the North Carolina Writers' Network and the Friends of the North Carolina Public Libraries. The Program Chair should include other groups as identified. Increasingly, there has been a demand for meeting rooms and time slots for users' groups of major bibliographic utilities and integrative automated library systems, many of whom may not be NCLA members. External groups must cover the facility cost for their session. This can be done by requiring participants to be registered for the conference or by paying a session fee established by the conference committee. The Program Chair should work with the Registration and Conference Committees to determine registration fees or waivers for these non-NCLA affiliated groups and individuals.

The Program Subcommittee is appointed by the Chair of the Conference Committee. Membership of the Program Subcommittee is representative of the NCLA membership at large and as such should include academic, public, school, and special librarians as well as library educators. The Program Subcommittee selects the speakers for and determines the format of the three General Sessions subject to overall approval of the Conference Committee. As much as possible, the Program Subcommittee will select speakers who address some aspect of the Conference theme.

The Chair of the Program Committee works in especially close contact with the Chairs of the following committees: Publicity, Registration, and Local Arrangements. As soon as the Chair of the Program Committee determines the formats and times of the General Sessions and receives plans from the program planners of the various NCLA committees and sections, this information is passed on to the Chairs of the aforementioned committees.

Program planners for the various NCLA committees and sections look to the Chair of the Program committee for leadership in terms of general ideas and suggestions for speakers, size and arrangement of meeting rooms, food and refreshments and time slots and length of time for sessions. The Chair of the Program committee facilitates the planning of jointly sponsored sessions and encourages informal as well as formal sessions. Although not responsible for making hotel reservations for speakers other than the General Session speakers; the Chair of the Program Committee should remind individual program planners to make hotel reservations for speakers for their programs. Based on the anticipated audience and estimated attendance, program planners communicate to the Chair of the Program Committee specific instructions regarding the room setup arrangement desired and audiovisual and electrical setup required. Table talks are defined as informal sessions, which may be repeated, and are designed for discussing various issues of interest among no more than 15 people. Audiovisual and electrical setups have not traditionally been provided for table talks because of the expense involved and the fact that, since large areas are often sectioned off to accommodate multiple table talks, noise can be a distraction when audiovisuals are used.

A General Session is planned for every day of the Conference, which traditionally has been held from Wednesday through Friday, with pre-conference events and early registration occurring on the preceding Tuesday. One of the three General Sessions is designated the Ogilvie Lecture in honor of Phillip Ogilvie, former NC State Librarian. The Ogilvie Lecture addresses the professional issues in librarianship. The third General Session, sometimes occurring in conjunction with the NCLA Conference Luncheon held on the final day of the Conference, is usually recreational rather than instructive. The formats of the General Sessions may vary

according to the content of the information to be shared, including, but not limited to lectures, panels, skits, musical performances and slide shows.

Speakers who are librarians and educators usually require the reimbursement of travel and lodging expense. In cases where there is no set speaker's fee, a modest honorarium of \$300 - \$500 is appropriate, particularly for non-NCLA members. The Program Chair will make every attempt to accommodate schedules of speakers for both the General Sessions and the individual programs. Although speakers for the General Sessions may also be obtained through contact with various speakers' bureaus, prices for non-librarian speakers range from \$3,000-\$10,000 plus reimbursement of travel and lodging expenses.

Serving as the advocate for financial support NCLA Conference program planners, the Chair of the Conference Program Committee is a member of the NCLA Finance Committee during the year proceeding the Biennial Conference and as such attends regularly scheduled and called meetings of NCLA Finance Committee. The Chair of the Conference Program Committee serves as liaison from the Executive Board and in this capacity gives updates on funding decisions regarding Conference programming.

G. Conference Registration

The purpose of conference registration is to handle pre-registration and registration of conference attendees. The focus of the committee should be on the provision of effective and professional customer service with a consideration of the best use of volunteer professionals' time and cost effectiveness.

Responsibilities of the conference registration committee are:

- To provide a clear format by which conference attendees may pre-register for pre-conferences, conference and special events or register on site at the conference.
- To expedite the pre-conference registration, conference pre-registration, and conference registration processes which include the production of name tags, tickets for special effects and receipts to make the best use of volunteer professionals' time and meet deadlines for completion. To develop procedures, establish a convenient location and hours of operation, and provide adequate volunteer staff to distribute pre-registration materials and register attendees on site at the conference. Volunteers who are recruited from various kinds of libraries are more likely to sign up to work needed days and times at the registration desk. Before the conference, a decision must be made whether or not to have a single or multi-station network to register patrons on site. One must consider the level of customer service desired (e.g., relative amount of time when a number of people are registering at the same time) versus the cost of renting and programming a multi-station network when making this decision.
- It is the responsibility of the conference treasurer to collect and deposit registration monies and to provide refunds in a timely fashion. The conference treasurer usually sits at the registration desk to handle the collection or refund of monies.
- To provide verification of NCLA membership and/or the opportunity to conveniently join NCLA at the conference. The NCLA administrative assistant has been traditionally stationed at or near the registration desk to answer questions regarding membership and registration fees and to recruit new or renewing members.

To provide accurate and detailed financial accounting of money transactions to the conference

treasurer. To provide an accurate and detailed account of the number of attendees who pre-registered or registered by type (member, non-member, library school student, vendor guest, speaker) and by day to the Conference Chair. (To provide an account of the number of attendees registered for special meal functions to the Conference Chair and the Local Arrangements Committee) All registration rates and fees are approved by the NCLA Executive Board. The Chair of the Conference Committee establishes policy regarding which speakers, guests, etc. do not pay fees to attend the conference.

The Registration Chair works with the Publicity Chair to design an appropriate pre-registration form and name tag to enhance the theme of the conference. The Registration Chair interacts with the Program Committee Chair to identify special events to be placed on the pre-registration form and with the Local Arrangements Committee Chair to arrange adequate and convenient registration facilities at the conference.

H. Local Arrangements

The planning done by the Local Arrangements Committee will be essential for a successful conference. Therefore, it is imperative that good lines of communication be established among the committee chairs and sections.

The Local Arrangements Committee has responsibility for making arrangements pertinent to the selected site. The Local Arrangements Committee has responsibility to arrange all meal functions, to provide hospitality, to arrange tours, to make sure rooms assigned to special speakers have a VIP Package, to handle any special needs as stated by the ADA, and to provide requested entertainment. It is also necessary that all deadlines be strictly adhered to.

The Chair of the Local Arrangements Committee is responsible for choosing and organizing a group to oversee the various responsibilities for local arrangements. The Chair of the Local Arrangements Committee should be a local person. The Chair of the Local Arrangements Committee will work closely with all other committee chairs.

The Chair of the Local Arrangements Committee reports to the Chair of the Conference Committee

Listed below are the specific responsibilities of the Local Arrangement Committee:

- Welcome letters from local leaders should be handled by this committee.
- Local Information for the conference website and/or an onsite table will be handled by this committee.
- All arrangements for flowers should be made through this committee.
- All meal functions should be handled by this committee.
- Guest speaker room VIP Welcome Baskets/Packages should be handled by this committee.
- All arrangements for special entertainment should be made through this committee.
- Special needs request such as signing for sessions; food allergies, etc. will be handled to the extent which is possible.
- During the conference, members of this committee will communicate by cell phone
- It is our policy to provide specialized services such as specialized transportation, etc. in as much as possible.
- This committee should have a preliminary budget in hand and adhere to it.

I. Publicity/Publications Committee

The purpose of the Publicity Committee is to promote the conference and convey all of the details so that NCLA members and supporters will choose to register for the conference. However, as with any publicity effort, there must also be an awareness that we are promoting and building a certain image of the organization. In that sense the impact of the conference publicity is subtle and cannot be measured merely by the conference registration statistics.

One of the most significant issues for this committee is the determination of the conference theme and corresponding logo. The vice-president, in conjunction with the conference committee, will develop a theme for the conference.

The publicity must express and interpret the theme. Consequently, the Publicity Committee cannot really begin its work until the theme is selected. Thus, it is very important that the theme be chosen several months in advance of publicity target dates, so that the committee and graphic artists have plenty of time to develop a logo, advertising and other promotional materials.

When choosing committee members, it is wise to look for the following skills and talents: marketing instincts, graphic skills, attentiveness to details and deadlines, and understanding of the complexities of the NCLA organization. Obviously, no one person possesses all of these, but the committee needs to have a variety of members.

J. Web site

The conference Web site is at: <https://www.nclaonline.org/conference>

Policy on Releasing Conference Attendee List

There will be a check box on conference registration to indicate release or non-release of contact information.

Two lists will be sent out free to corporate vendors who register as exhibitors for conference and request a list. These two lists will be of the attendees before and after conference.

There will be a charge for lists in excess of two at the discretion of the Executive Board.

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