

Lessons Learned

Event Planning

Event Types:

Generally, we like to have one big event in the Fall, and one in Winter/Spring. Other events are kept to evening sessions (less work). The first event attempts to be somewhat social, such as a library tour with refreshments and time for socializing/networking. The Holiday social is always jointly held with LAOH. Responsibility for organizing the holiday social falls to CASLIS on even years and to LAOH on odd years.

Locations:

For evening sessions, both the National Library (rooms 154[30 people] and 156[70 people]) and Ottawa Public library [200 people] can be gotten free of charge. Advance booking is required to ensure availability.

For daytime sessions, it is helpful to get the sponsorship of someone at the National Library or other organization to get a venue for free.

Turnout:

The turnout for evening sessions over the past two years has ranged from 24 to 60. Turnout for daytime sessions that were not limited enrollment ranged from 45 to 80 (straight CASLIS) to 140 (cosponsored with CFL).

Most limited enrollment sessions over the past two years have sold out. The only one that didn't was a presentation on *How to manage others with tact and skill* that was repeated for the third time at that point.

Who does what:

We tried having a separate executive position for program convenors and a person to do local arrangements. It turned out that it was a hassle to separate the arrangements for venue etc. from the confirmation of speaker since you had to know when each were available to get the right date. If an event turns out too much to handle for one person, portions can always be delegated to others on the executive.

Sponsorships:

Rowecom (now Divine) wants to sponsor coffee breaks for any session that is remotely to do with serials.

EBSCO Canada provides a \$250 fund each year to subsidize the attendance of students at events. We usually don't manage to use up the entire amount each year, but EBSCO has agreed to top it up each year.

Refreshments:

Full day sessions: Including lunch as part of an all day session is far too expensive for what you get. We no longer include lunch (unless we have it sponsored) but have the person introducing the event mention where people can go for lunch. The event flyer can also state that lunch is not included. Coffee breaks should always have refreshment supplied for half or full day events.

Evening Sessions: People polled and don't really care if refreshment is offered or not. Therefore, don't bother - too much trouble. Generally, since they don't know what might be offered, they bring their own drinks and snacks anyway.

Start times:

Evenings: People prefer 6:30 or later because it can be difficult to finish work at 5:00 and get supper and arrive by 6:00. On average 6:30 or 7:00 start times are the best. We don't want to keep people past 9:00pm if we can help it.

Mornings: depends on the audience. For the Serials cataloguing workshop, attendees were used to working early and asked to start at 8:00am to be done earlier. For most other sessions, the preference is for 9:00 start (which translates into 8:30 registration minimum), as many people find it difficult to be there much earlier.

Registrations:

Found that for events with no seating limit, and that are free or very cheap, or where security is not an issue, advance registration is a burden. Therefore, only do advance registration when necessary.

Newsletter

Attempt to have 4 newsletters per year in September, November, February and April/May.

<more to come later>

Web Site

<more to come later>

Listserv

<more to come later>

Grants

One year we had only one applicant for conference grant, so it was awarded to him. The following year, he applied again and for a time, it looked like he would be the only one again. We amended our policy to disallow people from benefiting more than once.

Membership Directory

<more to come later>

Budgeting/Finance

Budget:

The budget for the following calendar year is usually submitted to the CASLIS National Treasurer in September. Plan a budget meeting with the president, past-president and vice-president around the end of August. Use the budgets from the previous 2 or 3 years to get an idea of the cost of recurring items.

- The annual audit: the chapter doesn't pay the auditor's fee, but you need to budget an amount for postage or delivery costs to mail your financial records to the CLA.
- Decide if there will be any projects in the upcoming year; any software or hardware that will be needed. You will need to write a summary, justifying the need to buy these things in the budget submission. Whatever hardware or software is bought is the property of the CLA, so keep a record of who has the item.

The most difficult part about doing the budget is estimating the bank balance for the end of the current year. Don't panic! If your estimated balance for Dec. 31 turns out to be incorrect, contact the CASLIS National Treasurer, and submit a revised version of the budget in the new year.

Banking:

Several years ago (before 1999), the CASLIS Ottawa treasurer asked the CLA to do the chapter's banking. Ottawa was the only CASLIS chapter that didn't do its own banking. Having the CLA manage our bank account was time-consuming and actually created extra work for the treasurer. The chapter treasurer had to mail or hand-deliver everything (e.g.: event income, invoices, expense receipts) to the CLA and had to ask the CLA to issue cheques to pay for bills, or to reimburse executive members or speakers. Petty cash also had to be requested from the CLA. Records of each transaction had to be checked against the CLA's ledger, financial reports couldn't be written until the ledger had been received and thoroughly checked.

In 2000, we asked the CLA if we could take over our banking again and it was agreed, with the caveat that we weren't going to change our minds and ask them to do it for us again in the future. The transfer occurred in early 2001.

CLA's Administration Fee:

The CLA introduced a 10% administration fee in 2001. This fee is for special services (e.g.: Visa), and for storing items at the CLA office. So far, the CLA has not charged us the admin fee for making hotel reservations for our speakers.

Ebsco Student Fund:

Ebsco donates money to the chapter in order to subsidize students at our events. When the fund gets low (at most once a year), contact Doug Lynch at Ebsco to have the amount topped up to \$250. Thank Ebsco at the AGM, events, and on flyers. It is a good idea to contact Doug annually (preferably before the budget meeting) to make sure Ebsco wants to continue this.

Finally, Linda Sawden-Harris, Manager of Financial Services at the CLA is extremely helpful, so don't hesitate to contact her.

Annual Retreat for Executive

We have found that having a full day meeting at the beginning of the CASLIS Ottawa year (changeover from old to new executive) helps to set the stage for the year. By having the time to discuss policies and procedures ahead of time, the future meetings are more productive in being able to focus on events and issues at hand. It also helps new members to get a good idea of the workings of the executive. Recommended to do this each year.