

Section Event Planning Handbook



LAWYER SERVICES AND OUTREACH (LSO)

Introduction and Overview

1

Begin the year by completing the events survey to tell us about *all* your known and tentative section events.

- ◆ Then update us every time you add or subtract an event, or change an event date.

2

For an event requiring **online registration**, please contact LSO at least **12 weeks** prior to event date.

3

Every contract must be reviewed by SBM—including contracts with venues, speakers, everything. Please contact contractreview@michbar.org

4

Decide whether you'd like a **post-event survey** at the *beginning* of the event planning process.

5

Time is of the essence. Start early and allow plenty of lead time for discussions, council meetings, and all the votes/decisions necessary to plan a successful event.

Your Year in Section Events

To kick off the bar year, please provide the following information through the survey that we provide, and supplement that information by emailing sectionevents@michbar.org:

1

Your section name and a **primary** contact person for section events. While the primary contact may change from event to event, we ask that you provide a *single* point of contact for each event.

2

All your event dates for the year (or rough approximates)

3

For *each* event:

- ◆ Event name (or rough approximate)
- ◆ Venue and city (if known or best guess)
- ◆ Event type: educational, networking, charity, awards?
- ◆ Will you need SBM staff assistance?
- ◆ Will you need a credit card option for registration?

Examples of available SBM staff assistance:

- Approving a venue contract (required)
- Setting up online registration
- Duplicating and distributing materials for an educational seminar
- Onsite staff support at the event
- Post-event surveys

Event Planning Steps and Responsibilities

How can SBM Staff help?

Section Responsibilities:

First Steps:

- Plan programs & confirm speakers
- Make out a budget for each event
- Select event dates (check the SBM calendar for conflicts)
- Book venues
- Submit all contracts to SBM for review and approval
- SBM must review and approve ALL registration forms
- Plan and execute strategies for marketing and publicity

Venues:

- Remember to consider location, travel time, accessibility, layout, cost, food, lighting, technical support, parking, staffing
- Plan the layout of the rooms well in advance
- Remember special dietary needs/ allergies, be sure to verify meal counts/guarantees
- Meals and Refreshments: If you request onsite staff from SBM, you must send us a copy of the Banquet Event Order (BEO)
- Order A/V set-up and WiFi for event registration and for use by attendees during the event
- Make arrangements for any onsite signage

Programming:

- Finalize an agenda for each event
- Speakers: Plan transportation, meals, and accommodations
- Gather and organize materials, decide how they will be shared, online? by email? printed hard copies?

Available Support from SBM Staff:

First Steps:

- SBM must review and approve all contracts
- The SBM Finance Dept. can help with budgeting
- The SBM Communications Dept. can help with marketing and publicity

Venues:

- SBM can provide insurance certificates for you to share with venues
- Please consider using the SBM Building as a venue

Programming:

- SBM can help you distribute materials in print or electronically, including post-event surveys

Section Responsibilities:

Publicity:

- Post events to SBM Connect and/or section listserv
- Determine target audiences, arrange to send e-blasts
- Invite non-section members
- Answer questions about event programming
- Choose and order any promotional items/ giveaways

Pre-Registration:

- Identify pricing for attendees and who receives discounted or free registrations
- Solicit sponsors
- Register all speakers, attendees, and guests who may have contacted the section rather than registering themselves online

During the Event:

- Meet with venue staff (arrive early)
- Verify the rooms are set up correctly
- Place any necessary signage in the venue
- Confirm all A/V and WiFi needs have been addressed
- Authorize any changes to the original plan
- Sign any required venue paperwork

After the Event:

- Encourage attendees to take the evaluation survey
- Reconcile the bills and submit to SBM for payment

Available Support from SBM Staff:

Publicity:

- Post your events to the SBM calendar
- Post event info on your section's SBM Connect website
- Send e-blasts to promote your events
- Send physical mail (flyers, etc.) to promote your events
- Provide section logotype layout for promos

Pre-Registration:

- Manage registrations & sponsorships
- Send email confirmations to registrants
- Track meal choices
- Create name badges
- Provide links to registration reports

During the Event:

- Upon request, SBM Staff can provide onsite assistance to check-in attendees and accept day-of registrations
- SBM Staff can also deliver printed materials if we are pre-scheduled to be onsite

After the Event:

- Upon request, SBM Staff can administer evaluation surveys

Event Information Minimum Due Dates

SBM cannot guarantee services when information is submitted after a due date.


Service charges for completed work are non-refundable.

SBM Staff will be happy to assist with planning your timeline.


DATE OF EVENT:					
SERVICES NEEDED	PUBLICITY ONLY - NO REGISTRATION HELP	PAPER ONLY REGISTRATION	ONLINE REGISTRATION	MATERIALS	OTHER
12 weeks to event			Checklist Completed		
11 weeks to event					
10 weeks to event					
9 weeks to event	Registration Form Approval	Registration Form Approval			
8 weeks to event		US Mail Flyer (consider holidays!)	Registration Form Approval		
7 weeks to event	Bar Journal - Note: no April edition	Bar Journal			
6 weeks to event		Website			
5 weeks to event		Eblast Reg Info	ONLINE REG. OPEN		Imprintables
4 weeks to event	Press Releases	Press Releases		3 Ring Binders	Request onsite staff support
3 weeks to event	US Mail Flyer			Bound Book	Surveys
2 weeks to event	Website			Handouts	Insurance Certificates
1 week to event				E-materials	BEO (Banquet Event Order)
4 days to event	Eblasts	Eblast Reminder Info	ONLINE REG. CLOSED		
3 days to event			Name Badges Printed		

Getting Started with LSO


Steps:




As soon as you have even a rough idea of a date for *any* section event, please inform LSO immediately by contacting Jennifer Hatter at 517-346-6414 or sectionevents@michbar.org.




Review the **Event Planning Steps and Responsibilities** pages of this document to see where SBM staff can provide assistance.




Review the **Event Information Minimum Due Dates** page of this document to make sure you understand the timelines.



Arrange a call with LSO to discuss your event. It is not necessary to have *all* the information we'll need right away. A rough estimate of your event date and an up-front conversation with LSO is always helpful!




For each event, complete the Events Checklist, located on the Sections Landing Page at michbar.org. Save a copy of the Checklist for yourself, then send a copy to LSO.




Once you've submitted the Events Checklist, LSO will provide any additional forms you will need. Examples include forms for registration pricing, meals, printed materials, sponsorships, etc.


Tips:




Please do not send a scanned copy of any form. If you need assistance filling it out, LSO will be happy to help!




Remember: If you would like *online registration*, we need your completed forms at least 12 weeks before event date. (If you offer a credit card payment option, you **MUST** use online registration through SBM.)




Remember: All contracts must be reviewed and approved by SBM.




Once you submit a completed form, LSO will review it and contact you for any clarifications or additional information.



LSO is always available to answer questions or to connect you with the SBM staff member who can answer your question.



Throughout the process, LSO will coordinate with the entire SBM Section Events Team to support your event.



All registration forms must be reviewed and approved by SBM.

Seminar & Events Checklists

This form can be found online at <https://www.michbar.org/file/sections/pdfs/seminarchecklist.pdf>



SEMINAR & EVENTS CHECKLISTS

Further information on services is available at <https://www.michbar.org/sections/services>.
Submit this form to sectionevents@michbar.org

THE STATE BAR OF MICHIGAN is pleased to offer support for your event. Many services are offered free of charge. Charged service pricing is listed on page 3. Service charges for completed work are non-refundable. Timelines are noted for most checklist items, as are deadlines.

Please see the attached timeline (p.2) for mandatory deadlines.

It is **MANDATORY** that the SBM general counsel review any contracts made by the section. Contracts can be sent to contractreview@michbar.org for review.

- ☐ I have not yet selected a venue for my event.
- ☐ I am currently negotiating a contract with the venue.
- ☐ I have submitted the contract for my event to SBM for review.
- ☐ SBM has reviewed and approved the contract for my event.

Contract Dates: (SBM USE ONLY)

CONTACT INFORMATION:

Section/Group(s) hosting the event: _____

Cosponsoring Section/Group(s): _____

Event Organizer(s): _____

Organizer's Telephone: _____ E-mail: _____

Event title: _____

Date(s): _____ Time(s): _____

Please see the attached timeline (p.2) to ensure mandatory deadlines can be met.

SBM may not be able to provide services if mandatory deadlines cannot be achieved.

Event type: ☐ Event: ½ day or less ☐ Seminar: Full day ☐ Conference: multiple days
☐ Teleconference ☐ Webinar ☐ Other _____

WHICH EVENT SERVICES DOES YOUR SECTION NEED? REQUEST ALL THAT APPLY:

☐ **ONLINE EVENT REGISTRATION (FORM A):** We would like SBM's assistance with:

☐ Online registration ☐ Both online and mail-in registration

☐ **PROMOTION & PUBLICITY (FORM B):** We would like SBM's assistance promoting our event.

☐ **MATERIALS (FORM C):** We would like SBM's assistance producing/distributing event materials.

☐ **ONSITE SUPPORT (FORM D):** We would like SBM's assistance onsite during our event.

☐ **SPONSORSHIP PROCESSING ASSISTANCE (FORM E):** We would like SBM's assistance processing sponsorship payments. A sponsor is a third party providing financial support to your event.

☐ **ZOOM MEETING:** We would like to discuss a Zoom meeting.

ONCE THIS FORM HAS BEEN RETURNED, WE WILL SEND YOU
ADDITIONAL FORMS AS REQUESTED.

Submit this completed form to LSO at sectionevents@michbar.org

We'll be in touch to discuss the details!

Tips for Contracts

1

Always begin *any* event planning by contacting LSO—whether your event includes contracts or not.

2

In *all* contracts, list the contracting party as:
[Name of Section] of the State Bar of Michigan.

3

Submit your contracts as early as possible.

4

Submit *all* section contracts to
contractreview@michbar.org for review and approval by the SBM Office of General Counsel.

5

Include in the body of the e-mail the date by which the contract needs to be signed. If a certificate of liability insurance is required please include that request in your email.

6

Allow five (5) business days for SBM review and approval, absent extenuating circumstances.

7

Send questions to contractreview@michbar.org.

Seminar Event Feedback Surveys

Event feedback is important! We can help with that!

After informing LSO of your event, contact Michelle Erskine at (517) 346-6318 so she can begin preparing your survey as soon as you set an event date and a theme for your event. Please do not wait to contact her—the earlier in the event planning process, the better.

Do think about the information you want to collect. What do you want to know?

EXAMPLES: Speaker evaluations?
Did attendees find the topics valuable?
Would they recommend other topics?
How was the venue? How was the food?


Don't worry about formatting your draft survey with check boxes or ratings scales. The SBM Staff will handle survey design.

Do remember people are busy. Information overload and survey fatigue are real. For successful results, attendees should spend no more than a minute or two completing a survey. Six to ten questions is a great starting point.

Don't forget to market. Get your survey out there! At the event, we suggest announcing the survey from the podium for more impact. You can send your survey to the attendees by email even before the event ends! Having a survey available *before attendees leave the venue* increases the response rate and ensures fresher comments.


Do think about sharing the survey link by email, on your presentation screen at the event, in your printed event materials, and posting the link in SBM Connect.

Finance Tips




Don't forget sections are exempt from sales tax!

For a copy of the certificate contact Finance.




Sections are covered under SBM's liability insurance policy.


For a copy of the certificate contact sectionevents@michbar.org.




SBM cannot provide an exact cost estimate for event services provided by SBM Staff. Every event is different. Staff time is charged at \$25/hour, and all other fees are clearly indicated in the events checklist forms.




If your section wants a credit card option for event registration, you **MUST** make arrangements to use SBM's event services at least 12 weeks before event date.



If your section is coordinating your own event and you want a personal check option for event registration, all collected checks **MUST** be delivered to SBM with a check transmittal form within **THREE DAYS** after receipt. The check transmittal form is located on the Sections Landing Page at michbar.org.



If SBM is handling your event and you would like a pay by check option, please have the attendee issue a check payable to the State Bar of Michigan and mail it directly to SBM with a copy of their completed registration form.



SBM will provide accounting for your event only after all invoices have been submitted, and will share that information with you in the first week of the month *following* the month in which you submit the final invoice.