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

### 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:

- 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?

### 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
<table>
<thead>
<tr>
<th><strong>Section Responsibilities:</strong></th>
<th><strong>Available Support from SBM Staff:</strong></th>
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<tbody>
<tr>
<td><strong>Publicity:</strong></td>
<td><strong>Publicity:</strong></td>
</tr>
<tr>
<td>• Post events to SBM Connect and/or section listserv</td>
<td>• Post your events to the SBM calendar</td>
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<tr>
<td>• Determine target audiences, arrange to send e-blasts</td>
<td>• Post event info on your section’s SBM Connect website</td>
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<tr>
<td>• Invite non-section members</td>
<td>• Send e-blasts to promote your events</td>
</tr>
<tr>
<td>• Answer questions about event programming</td>
<td>• Send physical mail (flyers, etc.) to promote your events</td>
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<tr>
<td>• Choose and order any promotional items/ giveaways</td>
<td>• Provide section logotype layout for promos</td>
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<thead>
<tr>
<th><strong>Pre-Registration:</strong></th>
<th><strong>Pre-Registration:</strong></th>
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<tbody>
<tr>
<td>• Identify pricing for attendees and who receives discounted or free registrations</td>
<td>• Manage registrations &amp; sponsorships</td>
</tr>
<tr>
<td>• Solicit sponsors</td>
<td>• Send email confirmations to registrants</td>
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<tr>
<td>• Register all speakers, attendees, and guests who may have contacted the section rather than registering themselves online</td>
<td>• Track meal choices</td>
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<tr>
<td></td>
<td>• Create name badges</td>
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<td></td>
<td>• Provide links to registration reports</td>
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<thead>
<tr>
<th><strong>During the Event:</strong></th>
<th><strong>During the Event:</strong></th>
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<tbody>
<tr>
<td>• Meet with venue staff (arrive early)</td>
<td>• Upon request, SBM Staff can provide onsite assistance to check-in attendees and accept day-of registrations</td>
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<tr>
<td>• Verify the rooms are set up correctly</td>
<td>• SBM Staff can also deliver printed materials if we are pre-scheduled to be onsite</td>
</tr>
<tr>
<td>• Place any necessary signage in the venue</td>
<td></td>
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<tr>
<td>• Confirm all A/V and WiFi needs have been addressed</td>
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<tr>
<td>• Authorize any changes to the original plan</td>
<td></td>
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<tr>
<td>• Sign any required venue paperwork</td>
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</table>

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<thead>
<tr>
<th><strong>After the Event:</strong></th>
<th><strong>After the Event:</strong></th>
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<tbody>
<tr>
<td>• Encourage attendees to take the evaluation survey</td>
<td>• Upon request, SBM Staff can administer evaluation surveys</td>
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<tr>
<td>• Reconcile the bills and submit to SBM for payment</td>
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</table>
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.

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

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.
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.

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.