

BALIS/PLS/SVLS Workshop Procedure Guidelines

The System Office will take care of registration, invoicing and payment processing, as well as contracts and payment of invoices for elements such as catering and room rentals. All workshop registration is conducted online using eVanced.

If you have any questions, please call 650.356.2129 to speak to Sarah Kimmel.

Basic Steps for Setting up a Workshop (all steps to be done by planner, unless noted)

- A. Schedule date and time
 - a. Coordinate schedule with presenter
 - b. Reserve room of appropriate size to accommodate anticipated attendance and any special needs
- B. If a contract is needed, get approval from Director, Business (Donna Truong)
 - a. Gather as much information as possible from the speaker/panel members, including fees, travel needs, date(s), phone number and mailing address.
 - b. Calculate registration fee, based on cost of presenter, workshop materials, room rental, advertising, refreshments and other associated costs
 - i. Registration fee equals the costs of the event (speakers' fees, catering, printing, advertising, room requirements) divided by the maximum number of attendees.
- C. Accommodate any special needs
 - a. Room set-up
 - b. AV requirements
 - c. Printed materials
- D. Advertising
 - a. Coordinate advertising
 - b. Send all event and registration information to the System Office for input into eVanced for online registration (see Information Needed from Workshop Planner below).
- E. Refreshments
 - a. Coordinate refreshments (catering or have items dropped off by staff).

Timeline

- Presenter name, address, phone number, email address to System office: ASAP
- Hard copy of flier, with instructions, to System Office for distribution: at least one month in advance
- Last day to register, especially if there is catering: one week prior to event
- System Office sends special materials to planner (via USPS): 2-3 days before the event
- System Office sends registration sheets to planner via email: 1-2 days before the event
- System Office sends invoices to libraries/attendees: 2-3 weeks after event

Information Needed From Workshop Planner

- A. Name, phone number, e-mail and fax number of planner and backup planner
- B. Establish deadlines:
 - a. Flyer distribution
 - b. Online registration: first and last day (firm date or number of days)
 - i. Recommend last day: at least one week if name tags to be mailed
- C. Special materials to be sent from System office:
 - a. Sign-in sheets
 - b. Name tags
 - c. Evaluation forms
 - d. Contact information for attendees before the workshop (i.e., mailing list)

Information Needed on Advertising Flyer

- A. Name of workshop and description
- B. Sponsoring organization/committee
- C. Date, time and location of workshop, including room number
- D. Contact person and telephone number/email
- E. Online registration webpage address
- F. Cost of registration (be sure to state if “free”)
- G. “For payment questions, please call (650) 349-5538”
- H. Registration deadline (recommend one week prior to workshop)
 - a. If no deadline, whether at-the-door registration is allowed
 - b. Any late-registration fees
- I. “[System] reserves the right to cancel all or any part of this event if there is insufficient registration or for other reasons. Information on this document is subject to change.”

In addition, the following information is needed for eVanced registration:

- A. Registration start/end dates
- B. Maximum number of attendees
- C. If the event occurs multiple times/dates, please note if the event is on-going, or if each time/date is a stand-alone event.
- D. Name of presenter
- E. Link to informational or organizational website (NOT online registration), if have

Workshop Supplies Checklist

Refreshment supplies:

- Coffee pot (large)
- Hot water pot
- Coffee (regular and decaf)
- Tea (regular and decaf)
- Water for speaker, attendees
- Sugar and artificial sweetener
- Powdered creamer
- Cups (hot and cold)
- Napkins
- Stick stirrers
- Knives, forks, spoons
- Paper plates
- Food trays
- Extension cords for coffee and hot water pots

Other supplies:

- List of attendees/sign-in sheet
- Name tags
- Workshop evaluation sheets
- Tape
- Signs for doors/windows with name of workshop
- Envelope for holding checks (if people can register at the door)
- Pens and markers
- Flip charts
- Easel stands
- Projectors
- Other equipment as needed

Notes

- Even if the flier is not distributed via the System Office, please send a copy of the flier to admin@plsinfo.org, for inclusion in the Workshop binder.
- All checks can be made to the hosting System (PLS, BALIS, SVLS, MOBAC).
- Every attendee who registers via eVanced should receive a confirmation email that includes payment information, as well as cancellation procedures.
- All presenters will be paid after an invoice is sent to PLS. No invoice = no payment.
- If your event requires a large print job that you would like the System office to take care of, please call 650.356.2129 to speak to Sarah Kimmel. Please factor in the cost of printing with how much you charge for registration.