POLICIES & GUIDELINES
FOR PLANNING & CONDUCTING
ANNUAL MEETINGS
OF THE
SOCIETY FOR THE PRESERVATION
OF NATURAL HISTORY COLLECTIONS
(SPNHC)[1]

PREFACE

The following is a document intended to assist host institutions in planning, preparing, and conducting annual conferences and business meetings of the Society for the Preservation of Natural History Collections (SPNHC). The section entitled *Policies for Conducting SPNHC Annual Meetings* applies to all annual meetings of SPNHC, whereas, the remainder of this document (*Guidelines for Conducting SPNHC Annual Meetings*) is intended to serve as a working source of information with recommendations that can help all parties involved in achieving a successful annual meeting. Each annual meeting of the Society for the Preservation of Natural History Collections has its own character and spirit. In large measure, this is due to the dedicated work of the Chair and members of the Local Organizing Committee (LOC). In recognition of the individuality of our meetings, this guide is focused upon fundamental mechanics of running an annual meeting such as deadlines, organization, registration, and some basic aspects of the annual meeting. This guide is just that, for members of the LOC are the ones who cope with the reality of the event and must feel free to make decisions in the best interests of the membership and the local situation. This document does contain, however, important pointers and suggestions that should be taken into consideration by LOCs when planning and conducting an annual meeting of SPNHC. These guidelines are subdivided into seven parts:

- PLANNING
- INVITATION PROCEDURE
- SELECTION PROCEDURE
- PREPARATION ACTIVITIES
- CONDUCTING THE ANNUAL MEETING
- POST-MEETING ACTIVITIES
- APPENDICES

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POLICIES FOR CONDUCTING SPNHC ANNUAL MEETINGS

I. Each Annual Meeting must be in agreement with the objectives of SPNHC as discussed in Articles I, II, and III of the Bylaws.

II. Financial matters associated with conducting the Annual Meetings are the responsibility of the host institution and independent of SPNHC finances.

III. The Annual Meeting will include one Council Meeting, an Annual Business Meeting, opportunities for Committee meetings, an Icebreaker, a Dinner (Banquet), and an opportunity for members to give presentations and to discuss topics of special interest (SIGs). Facility tours and pre-conference field trips are frequently organized but optional activities. One or more pre- or post-conference workshops may be organized in conjunction with the Professional Development Committee.

IV. The only expected publication is a Program and Abstracts. Unless other arrangements have been made with the SPNHC Council, neither the host institution nor SPNHC will be obligated to publish the presentations given at the Annual Meetings. Submission of such contributions to COLLECTION FORUM or similar publication is encouraged.

V. Funds raised for Annual Meetings by the Local Organizing Committee through registration will, under no circumstances, be used for profit or to cover the expenses of SPNHC members or members of the Local Organizing Committee.

VI. Selection of sites for Annual Meetings will be based on invitations normally received at least three years in advance of the scheduled event. The acceptance of an invitation will be determined three years in advance at the Annual Business Meeting by a majority vote of attending members. Formal acceptance of an invitation is determined by vote of Council following the ABM, See 1.A. Institutional Support, II. Invitation Procedures and Selection Procedure.

VII. English will be the preferred language used for presentations and printed materials associated with the annual meeting. Hosts should check into the necessity of supplying a sign language interpreter or other language interpretation in their location. This can be a costly endeavor and requirements and responsibilities should be investigated as early as possible in the planning process.

VIII. The preservation objectives of the host institution to care for their own exhibits, collections, and related holdings should not be compromised by activities of SPNHC Annual Meetings.

GUIDELINES FOR CONDUCTING SPNHC ANNUAL MEETINGS

I. PLANNING

In determining the feasibility of hosting an Annual Meeting, be aware that the basic requirements are institutional support, availability of suitable facilities, and an appropriate schedule.

A. INSTITUTIONAL SUPPORT.

1. FINANCIAL
The institution itself will inevitably cover some expenditures of the annual meeting. Coverage may range from incidental expenditures (for example, telephone and mail communications, photocopying, etc.) to cash contributions.

2. OPERATIONAL
The institution often has various operational functions and staff involved with bookkeeping, security, custodial services, publicity, exhibits, parking, etc. that can be used in planning an annual meeting.

3. STAFF
A cooperative effort by the staff can make the event very special for the institution and provide important training and professional development opportunities.

4. COLLABORATIVE MEETINGS
Joint meetings have several advantages including synergy with a sister organization or group, greater participation and an increase in workshop offerings. On the down-side, it may be a more complicated meeting to run.

- Early in the process, collaborating organizations must clearly define their expectations and responsibilities.
- Collaborative meetings may take a variety of forms, from a simple participation with partial overlap in timing of the conferences, possibly with one of more joint sessions, to a fully integrated program (i.e., a true joint meeting). The collaborating organizations must define the level of such integration they wish to achieve or the level that is functionally achievable. Consulting past LOCs that have organized joint meetings can provide great insights into the advantages and challenges.
- While the organization of an annual meeting is not intended to generate surplus revenues, in circumstance where such surpluses are realized, the appropriate sharing between the collaborating organizations must also be defined and agreed upon early in the process.
- Most aspects of an annual meeting are scalable to a larger participation. The selected venue, however, must provide enough space for the anticipated larger audience: e.g., a large auditorium for joint sessions such as keynote presentations and plenary sessions; enough large rooms for concurrent technical sessions; a sufficient number of meeting rooms for committees.

- The costs of accommodating a larger audience may jump significantly as the number of venues providing such larger spaces may be limited and may charge an inordinate amount.

B. FACILITIES

1. CONFERENCE SITE
Conference site must be adequate to allow the activities of the Annual Meeting to be accomplished in an effective and expeditious manner. Comfort and conveniences are always well received, and good wifi is essential. Local visitor and convention services can assist with locating a venue.

a. MEETINGS.
1) Plan meeting space for at least 400 people.
2) Convenient location with respect to other meeting activities.
3) Suitable lighting and controls, appropriate audio-visual equipment, and set-up suitable for speakers to effectively address a large audience.
4) One room should be large enough to house all attendees for plenary sessions and the ABM.
5) Smaller venues for concurrent sessions, committee meetings, Council meeting, breakout sessions, Special Interest Groups (SIGs), etc.
6) Vendor and poster set-up within proximity to coffee break areas is especially desirable but requires space for adequate movement amongst these activities. Good adjacencies between sessions and vendors' area are essential.

b. WORKSHOPS.
1) Workshop facilities will depend primarily on the nature of the workshop.
2) Include adequate space, suitable furniture (particularly writing surfaces), and suitable teaching aids, such as PowerPoint presentations with LCD projector, white boards, and microphone.
3) Demonstrations and/or exercises may require special facilities such as electrical outlets, sinks, first-aid equipment, and fire-prevention equipment. Work with workshop developers to determine needs.
4) Participants at workshops some distance from the host site could expect to share in the cost of transportation as part of the workshop fee.

c. SPECIAL EVENTS.
1) Facilities for special events will depend on the nature of the event.
   a) Symposium will have the same requirements as those for Meetings (discussed above under workshops).
   b) Social events should provide food, drinks and space to mingle.

2. DINING.
a. All meals should be easily and efficiently obtained.
b. Consider providing information about dining possibilities for all 3 meals to participants.
c. Provide enough variety to accommodate anyone's selection of prices, dietary needs, speed of service, and size of crowds.

d. Consider providing breakfast and lunches for meeting days when feasible or if catering minimums exist.

3. LODGING.
   a. Facilities for lodging should be clean, comfortable, convenient, and provide basic necessities for travelers.
   b. Efforts should be made to obtain economical rates for attendees. The option to utilize dormitory space/university residences is important to many of our members. It is traditional to provide such information for registrants to consider while making their travel arrangements.
   c. The meeting site should be easily accessible from lodging. Consider mass transit and the possibility of hiring buses as options if accommodations are widely scattered.
   d. Some LOCs have found help via their local tourist board.

4. EQUIPMENT.
   a. Equipment that is essential for a conducting a meeting includes sound systems, LCD projectors for PowerPoint presentations, a presentation previewing area, lighting, etc.
   b. Provide access to computer, printers, photocopying equipment and where possible, wireless internet access. The SPNHC Secretary and other officers often seek such services during the meeting.
   c. Ensure that competent A/V and IT technicians are available during all sessions to assist.

5. CONFERENCE WEBSITE AND SOCIAL MEDIA.
   a. A website should be provided that includes all the information about the conference for registrants to consider while making their travel arrangements as well as to create a Facebook page and Twitter handle to facilitate sharing of this information. As such, this website should be up and running well prior to the meeting and can be an iterative process with preliminary information posted first. This also avoids the costs of printing pre- conference announcements with a preliminary program and of mailing these documents. The following are subjects usually included on a conference website:
      1) Welcoming/Introduction (i.e., Home) page
         i. This page provides the first glance at the conference and quick access to all the information via sidebar menus and page tabs.
         ii. Quick news and important changes/announcements are best presented on this page but a separate News page may be useful to present longer pieces of information.
         iii. A meeting Code of Conduct should be included on the web site. (See Appendix 2 for a sample)
         iv. In addition to the Conference logo, the SPNHC logo appears on this page, along with the logo(s) of any collaborating organization(s) and of the host institution(s).
         v. It is important to provide sponsors and vendors with as much visibility as possible. Their logos can be presented in the lower portion of the Home page, usually in a fashion that reflects their level of participation.

2) Program page
   i. This page usually shows a summary of the program and a link to download a more detail version (when available).
   ii. Subpage tabs (or sidebar menu) will direct the visitor to detailed information on the following topics: Speakers, Workshops, Field Trips, and Social Events.
   iii. An additional subpage with information on the conference venue may be linked here or under the Local Venue and Tourist Information page
   iv. Refer to Section IV, subsection G, article 11, for further information.

3) Registration page
   i. When deemed possible and appropriate by the LOC, an online registration system is recommended to avoid the burden of having to manually process all financial transactions, including registration cancellations and changes.
   ii. The overhead cost for using an online registration service, including the use of a credit card service provider, will be taken into account in setting registration costs. Normal overhead costs vary between 7-10% of the registration transaction value.
   iii. In the EU there are regulations surrounding the collecting of contact information from meeting participants that are outlined in the EU's General Data Protection Regulation https://gdpr.eu/article-28-processor/. Some provision for dealing with these regulations should appear on the registration page or on the home page for the meeting. See Edinburgh's 2020 website for an example.
   iv. It is recommended to display the registration costs on the Conference Registration page instead of just within the online registration process; users prefer to see those costs up front instead of just when they actually register.
   v. Examples of registration rates and categories:
- Early Bird Rate and Regular Rate for the following categories:
  - SPNHC/Collaborative Organization Members;
  - Student Members;
  - Regular Non-members;
  - Student Non-members;
  - Student Volunteers

   vi. Differences in rates serve the purposes of:
- Encouraging early registration;
- Encouraging participants to become a member of SPNHC or a collaborative organization;
- Provide a very affordable rate to students to encourage their participation.

   vii. Terms of the cancellation policy should be clearly stated on the Conference Registration page or as part of the online registration process.
   viii. The online registration process may also allow participants to submit one or more abstracts for oral presentations and /or posters.
   ix. The online registration process may also include options for various other events, identification as a newcomer etc.

4) Abstract Submission page
   i. Provides instructions on how to submit abstracts and what format to follow.
   ii. Information on the oral presentation format (e.g., duration, equipment) and standard poster board size can be included here.
   iii. Refer to Section IV, subsection G, article 8c and articles 10a and 11, for further information.

5) Awards and Travels Grant page

     i.   Information on the submission of an application for the Gerald R. Fitzgerald and Christine Allen Travel Grants is provided here.

     ii.   Application process for other award programs may also exist, particularly for collaborative organizations.

6) Sponsoring Partners page
   i. Information on the registration for sponsors and/or vendors is presented on this page.
   ii. Because representatives for potential sponsoring organizations and commercial vendors are highly solicited and often on the road, it is critical to make the information and process as clear and as accessible as possible.
   iii. Refer to Section IV, subsection E, article 12a and subsection F, articles 2 and 5c, for further information.

7) Accommodations/Lodging page
   i. Provides information on various lodging options for participants, including hotels or residences where special conference rates have been negotiated by the LOC or their representative.
   ii. Refer to Section I, subsection B, article 3, for further information

8) Local Venue, Travel and Tourist Information page
   i. Provides information on city/location where the conference is being held, on transportation from the airport(s) and other modes of transportation to get to the conference venue.
   ii. Includes links to city maps and other tools to get to the venue location and visit the surroundings, including various points of interest such as museums, botanical gardens, aquaria and zoos.
   iii. Usually includes a list of restaurants and other services at and around the conference venue.

9) Contact page
   i. Provides information on the Local Organizing Committee and specific individuals to contact for issues regarding registration, abstract submission, sponsorship and vendor participation, workshops, etc.
   ii. Also provides an opportunity to acknowledge the contribution of the many individuals helping in the organization of the annual meeting.

b. Facebook, Twitter and Instagram
   1) Both of these avenues can be important mechanisms for sharing short communiques or information regarding updates of conference content or planning. These can be created as soon as official acceptance of the meeting has been provided

c. Posting of documents and photos
   1) A number of electronic documents can be posted on the conference website:
   i. Preliminary conference program;
   ii. Registration and abstract submission forms (if not done online);
   iii. Travel Grant application forms
   iv. Sponsoring Partner Solicitation (see Appendix II for a sample);
   v. Full Program and Abstracts document (usually posted after the conference);
   vi. Special reports and summaries of sessions or workshops;
   vii. Provides information on the Local Organizing Committee and specifics about the meeting.

2) Photos and other images
  i. Graphics, banners and other images may be used to illustrate a variety of subjects and make the website esthetically attractive.
  ii. Photos of the conference events and participants may be posted on the conference website.
3) Copyright issues
  i. Images and downloadable documents posted on the conference website are subjected to Copyright Laws. Written permissions to used material may be required.
  ii. As a general rule, no one should make use of other's materials (graphics, text, etc.) when they publish on the Web unless they have requested and received formal permission to do so.

d. Longevity and use of the conference website
  1) It is up to the LOC to determine how long the website should stay accessible online.
  2) Normally, the cost of keeping the website active for a few years is fairly minimal and easily included in the overall conference budget.
  3) Often, the final program and abstract document (PDF) is be posted to the website after the conference, along with photos of the events/activities and participants. These are can be accessed for a year after the end of the conference.
  4) Websites of past conference are also very useful, serving as a template for those preparing a website for an upcoming conference.

C. SCHEDULE.

1. TIMING.
   a. The Annual Meeting is usually held between late May and early July. An effort must be made to avoid scheduling a meeting at a time when other conferences or other activities would compete for participants and/or resources.
   b. Potential conflicts with other organizations include, but are not limited to:
      - American Alliance of Museums (AAM; www.aam-us.org)
      - Natural Science Collections Alliance (NSCA; www.nscalliance.org)
      - American Institute for Conservation (AIC; www.conservation-us.org)
      - International Institution for Conservation (IIC; www.iiconservation.org)
      - American Society of Ichthyologists and Herpetologists (ASIH; www.asih.org)
      - American Society of Mammalogists (AMS; www.mammalsociety.org)
      - Canadian Museums Association (CMA; www.museums.ca)
      - Canadian Association for Conservation (CAC; www.cac-accr.ca)
      - Geological Association of Canada (GAC; www.gac.ca)
      - Geological Society of America (GSA; www.geosociety.org)
      - Society of Vertebrate Paleontology (SVP; www.vertpaleo.org)
      - Entomological Collections Network (ECN; http://ecnweb.org/)
      - Geological Curators Group (GCG; http://geocurator.org/)
      - International Committee for Museums and Collections of Natural History (ICOM NATHIST; http://icom-nathist.org/)
      - International Society for Biological and Environmental Repositories (ISBER; http://www.isber.org/)
      - Natural Science Collections Association (NatSCA; http://www.natsca.org/)

- Society of Herbarium Curators (SHC; http://www.herbariumcurators.org/)

    c. Consideration should also be given to holiday conflicts – Memorial Day (last Monday of May), 4th of July and Victoria Day (Canada – Monday proceeding May 25th) as well as local holidays.

    d. For outside of North America, relevant conferences and holidays in the relevant geographical region should be considered as well.

    e. Consider partnering with other organizations, including the above for joint meeting.

2. DURATION.

    a. Consider a total of 4-5 days for the primary activities, not including the workshop(s). The following is a suggested general schedule:

        1) Day 1-2 Committee Meetings, Field trips, newcomers events, collection tours and Ice Breaker Reception.

        2) Day 3-5 Plenary and technical sessions, Special Interest Groups (SIG) meetings, DemoCamp, vendors (tradeshow), posters, etc.

        3) Last day to include ABM and Council meeting. Liaise with Council to determine best timing.

        4) 1 or 2 days of workshops either pre or post conference.

    b. Watch for conflicts when scheduling.

        1) Do not schedule anything in conflict with committee or council meetings.

        2) See Appendix for sample and suggested scheduling patterns.

II. INVITATION PROCEDURE

Once the institution has determined that it has the ability to host an Annual Meeting, an invitation must be extended to SPNHC. Basically the invitation procedure involves an initial verbal communication followed by a formal letter of invitation.

a. VERBAL COMMUNICATION FROM CONTACT PERSON
Institutions that are interested in hosting the Annual Meetings should initially contact the SPNHC President and the SPNHC Conference Committee Chair to discuss the possibility and to receive further direction on procedures to follow. Discussions for invitations usually start at least 3 years prior to the meetings associated with the invitation.

b. LETTER OF INVITATION FROM DIRECTOR/PRESIDENT OF INSTITUTION
A formal letter of invitation from the institution must be sent to the SPNHC President. The invitation should be sent at least three months before the Annual Meeting that is two years prior to the proposed meeting. A copy of this letter should also be sent to the Conference Committee Chair. The SPNHC President will be responsible for acknowledging the invitation and providing further instruction. **It is important to make sure that the representative for the institution making the invitation has the authority to make this commitment and has the backing of the entire organization.** See Appendix for sample letter of invitation.

III. SELECTION PROCEDURE

The success of an Annual Meeting is largely dependent on the participation of the membership.

A. FORMAL PRESENTATION TO SPNHC MEMBERSHIP
Institutions providing invitations will be expected to give a five-minute presentation (including audiovisuals) at the Annual Business Meeting (ABM) to inform attending members about the facilities, activities, and costs of registration, lodging, and meals for the proposed meeting.

B. MAJORITY VOTE OF MEMBERSHIP AT THE ABM
The members attending the ABM will vote on future meeting sites based on what they know about prospective sites and where they would most likely attend. An attempt should be made to hold on a regular basis annual meetings outside North America. On an occasion where more than one invitation has been received for a given year, the final decision for accepting an invitation will be determined by members attending the Annual Meeting two years prior to the proposed invitation date.

C. CONFIRMING VOTE BY COUNCIL
The official acceptance of an invitation occurs by vote of Council following the ABM (usually by email vote).

IV. PREPARATION ACTIVITIES

After an institution has been selected as the location for a future Annual Meeting, there are a variety of activities that need to be considered in preparing for the meeting.

A. COMMUNICATION
It is essential that the Chair of the Local Organizing Committee maintain communication with the SPNHC President-Elect (Conference Committee Chair).

B. EARLY PLANNING
It is extremely useful to have an early idea about the basic activities and dates intended for the proposed Annual Meeting. In the year between the formal acceptance and the interim meeting, develop a draft outline including: special topics, speakers, symposia, workshops, and tours. This information can be used for promoting the meetings, which in turn can encourage attendance, participation, and financial support. This information will also help in defining the type of facilities required and making space reservations well in advance.

C. ACTIVITIES AT THE "INTERIM" SPNHC ANNUAL MEETING
Every effort should be made to encourage attendees from the host organization to attend the Annual Meeting preceding the one they will be hosting. This will enable representatives from the host institution of the future meeting to ask questions and to get a good idea of how an annual meeting runs.

- Having information/pamphlets available for distribution and having an attractive poster display of the future annual meeting are also encouraged.
- It is highly desirable to have the future annual meeting logo and theme developed and available at this interim meeting. Consider including an ad for the meeting in the printed program for the interim meeting.
- Presenting an update at the ABM is highly recommended.
- The interim meeting is also an excellent time to make contact with sponsoring partners and hosts of past meetings.

D. EARLY ANNOUNCEMENTS
To allow for budget planning, it is useful for many individuals and institutions to be aware of the basic details of the SPNHC Annual Meeting as early as possible.

- Send emails and post messages on the NHCOLL-L listserv, the SPNHC website and social media (Facebook and Twitter) providing basic information, such as dates, special speakers, symposia, special workshops, and any other information that would encourage individuals to attend the meeting at least six months in advance of the meeting.
- Include approximate cost for housing, meals, etc. This information is important in budget planning for attendees.
- Email announcements on various list-serves and social media postings are useful avenues for reaching potential non-members that may be interested in attending the meetings.
- Early announcements should be at least sent to members of SPNHC Council, including Chairs of SPNHC Committees.

- Official lists and information, including contact information for the membership and can be acquired through the SPNHC Treasurer (membership info) or SPNHC Sponsoring Partner Liaison.

E. CREATE LOCAL ORGANIZING COMMITTEE

The creation of an effective Local Organizing Committee is one of the most important parts of hosting the Annual Meeting. It is important to include as many staff members, associates, and volunteers as possible. Selection of people for various responsibilities should take into consideration the special abilities, interests, commitment, dependability, and time of each individual. Suitable individuals should be selected to chair subcommittees that will handle various aspects of the meetings. Participation in the LOC can also present effective mechanisms for training and professional development. Based on previous experience, the following categories represent important responsibilities of the Local Organizing Committee.

The number on a team can vary according to the task. Some tasks are easily accomplished by one person; others are better done as a small team. Some team members might take on more than one task and some tasks may overlap.

1. CHAIRPERSON. The Chairperson should be able to commit the time and effort needed to work with individuals and subcommittees to develop, organize, and initiate the activities of the meeting. Based on past experiences, while it is important for the Chairperson to be aware of progress in most, if not all aspects of the annual meeting preparations, delegation of responsibilities to as many individuals and subcommittees as possible is strongly recommended to avoid becoming overwhelmed by an overload of work. This is particularly critical as one gets closer to the time of the annual meeting the Chairperson needs to be free to address last minute issues and emergencies without sacrificing other responsibilities.

2. PROGRAM DEVELOPMENT. An essential part of the Annual Meeting is getting individuals to give oral and poster presentations. The host will also determine what, if any symposia, will be held and obtain speakers for these as well. It is helpful to include a few SPNHC members outside of the institution on the Local Committee to assist with the solicitation of presentations. Coordination with various SPNHC committees in connection with specialized content is also important (SIGs, newcomer events, workshops, committee meetings, council meeting etc.)

3. PROGRAM AND ABSTRACTS PRODUCTION. The Program and Abstracts will be the primary publication resulting from the Annual Meetings. Copies of the Program and Abstracts will be distributed to registered attendees. The registration form can include the option for members not attending the meeting to order the Programs and Abstracts for a nominal cost including postage and handling. Indicate that copies must be ordered prior to the registration deadline. It is now customary to make the Program and Abstracts document available in PDF on the conference website after the annual meeting.

4. REGISTRATION AND RESERVATIONS. The proper handling of registration and reservations before and during the meetings is very important to attendees and the host institution.

- It is strongly recommended that the LOC use electronic registration with online credit card payment and online abstract submission as well. Such online services may be available through the host or partner institution or from a commercial service provider. Some overhead costs for using these services may apply and should be taken into consideration when setting registration pricing.
- The LOC needs to have detailed documentation and accounting of all income and expenses. See a sample budget in the Appendix.
- Registrants should receive email confirmation of registration and of receipt of fees.
- Registrants will be given appropriate registration materials at the beginning of the annual meeting.
- As privacy laws permit, the LOC may also wish to prepare a list of names and contact information of registrants for distribution.
- A copy of all information that is provided to meeting registrants should be set aside for the SPNHC Archives. The SPNHC Archivist advises on what should set aside from registration package for archiving.

5. SOCIAL ACTIVITIES. The primary social activities of the Annual Meeting are the Ice Breaker Soirée and a Dinner or banquet while a newcomer event has now become customary too. These activities require appropriate locations and possibly assistance with catering, cleaning up, security, etc. Additional Mixers are occasionally included when time permits, giving the opportunity for attendants to visit another local institution of interest.

6. LOCAL TRANSPORTATION. The need for local transportation will depend on the location of scheduled events and of the main lodging facility(s). Provide information on mass transit and shuttle service between airports, lodging and the meeting site. The LOC may also need to schedule shuttles for the following:
- Tours and other special activities.
- Shuttle service between the meeting site and local airports, particularly if normal transportation is a problem.
- Shuttle between the meeting site and the lodging site if other transportation is infrequent or hours of service do not coincide with meeting activities.

7. LOCAL SERVICES. The local services include provision of beverages and possibly snacks, for scheduled breaks during the meeting. This activity requires good organization to quickly accommodate great numbers of people during a short specified time period. Most meeting sites will help you arrange for these services.

8. INTERNAL RESOURCES. Placement and use of internal resources, such as

rooms, projectors, copiers, miscellaneous storage spaces, furniture, workshop equipment, wifi availability and other items should be arranged. Registration equipment, documentation and packages should be placed in a secured location at the end of each day or when then registration desk is not manned.

9. EXTERNAL RESOURCES. Attendees will need to know about the local dining and lodging facilities available outside of the institution. It is also good to know about other activities and places to visit in the area. Other helpful information might include local public transportation options, especially to/from the meeting site, parking, spouse activities, and childcare opportunities. Local visitor and convention services can often provide this information.

10. GRAPHICS. Attractive artwork and labeling are needed to effectively convey information to attendees. There can never be too much signage directing attendees to the meeting rooms, poster session area, sponsors/vendors tradeshow room and other useful locations.

11. WORKSHOP, FIELD TRIPS AND TOURS COORDINATION. Participation in some workshops, field trips and tours may be restricted. Therefore, it is necessary to develop and schedule enough activities to accommodate as many registrants as possible at any particular time throughout the day.

12. LOGISTICS COORDINATOR. This task can be divided into several categories: Sponsoring Partners, SPNHC Resource Display and Membership Booth, Volunteer Coordinator, and Poster Display Session. Displays associated with the Annual Meeting primarily include poster presentations, but can also include demonstrations, corporate displays, and tables for handouts. All displays should be organized in an attractive manner facilitating good traffic flow for viewers. In order to attract sponsoring partners to our meetings, it is crucial to situate the poster sessions, vendors' tradeshow area and break room in close proximity.

   a. SPONSORING PARTNER RELATIONS: It is vital to maintain ongoing contact with sponsoring partners. They will provide the financial support to offset the rising costs of the annual meeting. Initial contact with sponsoring partners should be coordinated with the SPNHC Sponsoring Partner Liaison, who will be contacting them to market the upcoming tradeshow opportunity and to connect them with the LOC Chair so that the Chair may initiate negotiations for their participation.
   - The interim meeting (i.e., a year prior to the meeting being organized) is a good time for the LOC Chair to establish contact with sponsoring partners:
     - Begin soliciting corporate assistance at the interim meeting;
     - Distribute and/or send out formal invitations;
     - Follow up with email and phone contact;
     - Ensure that the space provided for the tradeshow is adequate in size, there is access to refreshments, that there is enough time for meeting attendees to visit sponsoring partners (including the literature table); organize a Sponsoring Partner lunch or social event to provide a dedicated time for all attendees to visit the partners
     - Trouble shoot promptly to keep the sponsoring partners happy;
     - Give out or send a final "Thank you" note;

- Send any updates to the master vendor list to the SPNHC Sponsoring Partner Liaison.

b. SPNHC RESOURCES DISPLAY. It is expected that the Resources Display Unit (RDU) of the SPNHC Conservation Committee will be displayed at the annual meeting. The interim meeting is a good time to request the RDU from the appropriate (US or Canadian) representative. **Financial support is available from the SPNHC Treasurer for shipping the display to the annual meeting venue**. Shipping should be coordinated with the RDU representative. The cost of reproducing the handout that accompanies the display is the responsibility of the borrower.

c. POSTER SESSION.
- Easily accessed, clear direction signage and close to refreshments (and when possible, near the tradeshow);
- Provide specific and sufficient time period(s) during the annual meeting for the participants to view the posters and talk to authors. Consider hosting a dedicated session with no additional concurrent offerings.
- Provide digital copies (where available) to the meeting website after the conference.

13. COUNCIL ASSISTANCE. Council and Committee meetings are held during the annual meeting and require comfortable and dedicated meeting rooms with good wifi. The Council may also need access to various document printing services.
a. COMMITTEE MEETINGS: Committees now meet during the Meeting to boost attendance and foster involvement by membership. The following Committees usually meet: Best Practices, Conference, Conservation, Documentation, Finance, Long-Range Planning, Membership, Professional Development (formerly Education & Training), Publication, Web, and one or more Sessional Committees.
- Scheduling can be difficult due to overlapping membership. See sample documents for suggested schedule in the Appendix;
- Feedback regarding scheduling of meetings may require proactive communication with committee chairs; the SPNHC Secretary can assist with this task;
- Circulate draft schedule amongst committee chairs for input well in advance of the meeting;
- Arrangements should be made for a quick lunch, so that afternoon Committee activities can proceed on schedule.
b. Council Meeting: There is one council meeting: Council meets late on the last day of the meeting, again starting over supper time. Check with the President for anticipated length and to determine if there should be food and refreshments; arrangements for a meal to be provided are generally required so that the Council meeting can proceed on schedule.

F. OBTAIN FINANCIAL SUPPORT
The success of Annual Meetings hinges on the ability to obtain financial support. Minimally, funds are acquired from the host institution (possibly in the form of sponsorship) and from registration fees. Because people attending SPNHC Annual

Meetings operate on limited budgets, efforts should be made to keep the costs of attending the annual meeting as low as possible. This often means that the LOC must also pursue additional support. The one thing to remember is that in reference to fixed costs such as conference spaces, equipment, and setups, the partitioned cost per individual decreases as the number of registrations increases – so there is an incentive to do everything possible to encourage maximum attendance at the meeting. It is also highly recommended that the management of all funds be centralized with the LOC and/or host institution to avoid subsequent challenges, especially with collaborative meetings.

1. INSTITUTIONAL. Cash contributions from the host institution can be used to cover registration expenses for members of the Local Committee and other special participants. In order to conform to Article V of the *POLICIES FOR CONDUCTING SPNHC ANNUAL MEETINGS* and to avoid the appearance of conflict of interest, however, these funds should not be appear as revenues in the Conference Budget. This benefit can also be used by the institution to encourage individuals to help with the meeting. The host institution and partners may cover other incidental expenses related to the meetings, such as communications, rental of space and equipment, and use of support staff. Sponsorship from host institutions can also be sought and would be managed under the terms for the *Sponsorship, Tradeshow and Advertising Agreement*; see a sample in the Appendix. Institutions outside of North America may need to run the finances somewhat differently due to local tax laws, etc.

2. CORPORATE. Corporate support can go from advertising in the program through display space at the tradeshow. Collected funds may be used to underwrite the cost of renting display boards for the poster sessions and advertisers' fees can be used to help underwrite the cost of printing the Program and Abstracts. Various aspects of our meetings, such as the banquet, coffee breaks, and workshops have often been financially supported through corporate sponsorship.
   a. Sponsoring Partners – The SPNHC Sponsoring Partner Liaison will introduce you to sponsoring partners. Follow the suggested guidelines in the *Sponsorship Opportunities* document and see the *Sponsorship Agreement* in the Appendix. A list of past sponsors/vendors and their history of support will also be available.
   b. Please let the Sponsoring Partner Liaison know if you will be soliciting local companies. These companies may already have existing relationships with your institution or are compatible with SPNHC's mission and the program you are developing. Local companies can be a great resource, however, it is essential to work through your institutions development/fund raising department to avoid potential conflicts
   c. Sponsorship fees should include the cost of registration that provides admission for a predetermined number of representatives of the company. This fee should be high enough to cover all incurred costs of the display (including equipment and space rental as well as coffee breaks) and making some money to support other meeting costs. The sponsors/vendors need to receive all relevant meeting information so they are aware of their audience.

   It is very important to provide equal opportunities and benefits to corporations, and to fully acknowledge their support without suggesting SPNHC endorsement. Contact the Sponsoring Partner Liaison for advice or help with this. The Local Organizing Committee can refuse a sponsoring partner or advertiser when it sees

legitimate grounds to do so.

3. FUNDING AGENCIES AND FOUNDATIONS. It may be possible to acquire funds through federal, state, or local sources for all or specific parts of the meetings. Such funding is usually dependent on written proposals being submitted to the appropriate agency or foundation in a timely manner (usually 6-12 months in advance).

4. REGISTRATION. A major part of the expenses of Annual Meetings is handled through collected registration fees. If registration fees and expenses for travel, food, and lodging are deemed too high, many individuals may not be able to attend the meetings. Rates should approximate the costs of benefits the individual receives during the meeting. Registration fees should not be set to generate profit or to cover the expenses of other SPNHC members or members of the Local Organizing Committee (see Article V of the *POLICIES FOR CONDUCTING SPNHC ANNUAL MEETINGS)*.
When setting the registration fees, a few tips are helpful:
   a. There are fixed costs that remain the same regardless of how many people attend the meetings. Fixed costs include space and equipment rental, security, AV equipment and IT support, set up costs for the Icebreaker, etc. Restrict mailings to sponsor and vendor letters.
   b. Variable costs are affected by the number of conference attendees. For instance, if considering food and beverage for breaks, one must work with a very good estimate of the number of attendees since catering services may require final numbers well in advance of the meeting. Ideally, try to negotiate the caterer the shortest deadline between providing these numbers and the actual catered event(s).
   c. Calculate a total estimate of fixed costs and divided by a conservative break-even registration number to get a base line charge. Then add a per person charge for items such as production of the registration package (name tags, program, carrying bag), food and beverages at breaks, and other variable costs that are dependent on the number of registrants. Don't forget to factor in taxes where applicable. If extra funding is uncertain by the time fees must be set, assume there will be none and plan for the minimum. If funding comes in after the registration fees have been set, then you may decide to augment benefits such as food at coffee breaks, etc.
   d. Offer graduated rates (early-bird, member, non-member, and student). Provide an option to join SPNHC to obtain a lower member's rate. Early registration provides working capital and facilitates planning.
   e. Accepting credit cards for registration is an expectation. This makes the registration process much more straightforward and makes it easy to refund monies if necessary. For payment by check, clearly indicate to whom registration is to be paid and where payment should be sent.
   f. It is useful to follow and improve upon the approach of previous annual meeting instead of reinventing the wheel.

5. ADDITIONAL CHARGES. Additional fees for special events can be added to the individual registration costs as long as the amounts of these expenses are reasonable, optional, and made known to attendees in advance.
   a. DINNER. Attendance at the Dinner should not be included as part of the

registration fee but presented separately as an additional cost. Additional income can also be acquired from the sale of tickets to non-registered attendees (for example, family members). Consider a reduced cost for students.

b. SPECIAL WORKSHOPS/FIELD TRIPS/TOURS/SYMPOSIA. Special activities often involve additional costs. In such cases, it is appropriate to ask participants to share the cost. Additional income can also be acquired from fees paid for workshops, field trips and tours by non-registered attendees, if all registrants have been accommodated and space are still available.

c. CHARGES FOR NON-MEMBERS. A non-member surcharge should be high enough (at least twice the current SPNHC membership cost) to encourage joining SPNHC. The registration form could include a reference to SPNHC membership information and encouragement to join.

d. LODGING. Lodging expenses are expected to be paid by the individuals using the facilities. Although no income would be expected from this source, normally there should not be any lodging expenses passed on to the host institution and the LOC unless the hotel requires a signed contract to reserve blocks of rooms and imposes a quota system with penalty if not all used.

e. LOCAL TRANSPORTATION. The committee is responsible for local transportation under the following conditions:

- If the meeting site is difficult to access from accommodations and a shuttle bus is required.
- If social events are difficult to access by foot or public transportation.
- If meeting site is difficult to access from local airport.

G. PLANNING ACTIVITIES.

1. LOCAL ORGANIZING COMMITTEE MEETINGS. Meetings of the Local Organizing Committee are essential in maintaining communication and avoiding problems. Minimally there should be an initial meeting of the institution administration and the Chair of the LOC to discuss schedules, funding, allocation of resources, and legal aspects. The best advice is for the LOC Chair to delegate as much as possible, making sure you have someone to assume responsibility for each assignment. This will allow the Chair to stay aware of all activities and step in where needed without having to abandon key tasks. Keep the committee informed so that everyone knows what is going on, use meetings for brainstorming and give LOC members realistic internal deadlines. A final general meeting (within two weeks of the Annual Meetings) should address last minute concerns and activities. See the sample Planning Schedule in the Appendix.

2. COMMITMENTS FROM SPECIAL SPEAKERS. The selection of special speakers is an important part of program development. It is not uncommon for good speakers to have other commitments for speaking engagements as much as a year in advance.

Furthermore, such speakers often expect at least to have basic expenses (travel, food, and lodging) covered by the host institution. Whatever arrangements are made, it is simply a professional courtesy to make requests for speaking engagements six to nine months in advance and perhaps as much as 15 months for special keynote speakers. When arrangements for speakers have been made, it is a good idea to document the details of the agreement with written correspondence, preferably from both parties. When a major speaker has been secured, it might be useful to advise the SPNHC

Conference Committee and/or the Executive Committee.

      a) SPNHC Commitment to Diversity and Inclusion (D&I). SPNHC recognizes the need and responsibility to develop current and future members. As part of this responsibility, it is suggested that special attention be paid to the invitation list for invited/plenary speakers. LOC are encouraged to seek diversity when looking for potential speakers. These guests are setting the tone for each year's meeting, but also for the organization. SPNHC welcomes any discussions with the LOC to help maximize diversity and inclusion support across SPNHC for all SPNHC activities.

3. COMMITMENTS FROM LOCAL PARTICIPANTS. To avoid problems with the professional and personal activities of Local Organizing Committee members, efforts should be made to get commitments from every individual. Every local participant should be familiar with and acknowledge what is expected of them.

4. RESERVE FACILITIES/EQUIPMENT. As soon as the Local Organizing Committee is aware of the physical needs for all activities of the Annual Meeting, even in general terms, appropriate people/services should be contacted to reserve the required facilities and equipment for specific dates. Because other unrelated functions of the institution may be competing for the same resources, it may be necessary to make reservations a year or two in advance, if not more. This is particularly true if external facilities, such as conference centers and those for housing and the dinner, are required. If the host institution has a Conference Planning Office, seek assistance from their staff. Be aware that Council members and Committee Chairs will probably arrive the day before the Council meetings. All reservations should be documented with written correspondence. It is also a good idea to verify/confirm all reservations after two to four weeks.

5. COORDINATE ACTIVITIES WITH APPROPRIATE SPNHC COMMITTEES. The Local Organizing Committee should coordinate its activities with at least the Society's Secretary, Treasurer, Conference Committee, Professional Development Committee, and Membership Committee.

      a) Secretary and Treasurer:
- Provide email addresses of SPNHC members. Emails, along with web-based announcements, are recommended as much as possible, to significantly reduce costs.
- Provide the updated membership listing. This is needed for determining membership status of registrants for member vs. non-member charges.

      c) Membership Committee: the meeting is an excellent time for recruiting members, so work closely with them.

      d) Conference Committee: The LOC is part of the Conference Committee; the latter can be approached for assistance (if needed), to help ensure a successful Annual Meeting.

      e) Professional Development Committee. Work closely with this committee to help organize workshops and other training opportunities.

6. FINANCES AND FUND RAISING.

    a. SET UP ACCOUNTS. An annual meeting can cost upwards of $200,000 USD,

and certainly well above that for a joint meeting. It is vital that you keep track of all expenses and income. See the sample budget in the Appendix.

> 1) Set up special accounts to handle incoming funds and expenditures. It may be mandatory for tax purposes to separate incoming funds in special categories for registration, lodging, donations, grants, etc.
>
> 2) Seek advice/support from your institution's financial support staff. They may be able to allocate a restricted budget account within the institutional system to handle all financial transactions for the conference. If the host institution has a Conference Planning Office, this service may also be available.

b. PROPOSALS. At least a year in advance, the host institution should be aware of potential agencies and foundations to approach for financial support. Proposals should be submitted in a timely manner to accommodate the schedule of the funding source as well as to provide time for resubmission, if necessary. Such sources of funding may fall within the realm of the *Sponsorship Agreement*.

c. SPNHC LOAN. The LOC may solicit for an SPNHC loan in the amount of $5000, which is interest free and usually paid-in-full within 6 months of the end of the annual meeting. The LOC should contact the Treasurer, at minimum, by February 28th of the year <u>in advance</u> of the year for which the loan is requested, since the loan requires Council approval and implementation of a SPNHC/Meeting LOC Loan agreement.

7. ADVERTISEMENT AND PROMOTION. Shortly after the previous Annual Meeting, and certainly at least seven to nine months in advance, the host institution should send out news releases about the forthcoming Annual Meeting. This will normally allow sufficient time for organizations to publish the information in appropriate publications and on websites prior to the meeting.

- Submit articles to the Editor of the SPNHC Newsletter for the Fall and Spring issues preceding the meeting. August 1 is the Fall deadline. February 1 is the Spring deadline.
- Announcements should be placed on the SPNHC web page.
- Announcements and call for papers can be circulated on NHCOLL-L and other appropriate list-servers.
- Announcements, updates and "teasers" can be posted to Facebook and Twitter.
- Hosts of past meetings will have additional suggestions as to where notices should be posted.
- Collection Forum should not be considered an outlet for advertising.

8. REGISTRATION INFORMATION.

a. PROGRAM OUTLINE AND SCHEDULE. It is important for the attendees to know as much as possible about the program so that they can plan their travel arrangements and other activities during the time of the meetings. This information can be posted on the conference website and linked to the SPNHC website.

b. FACILITIES INFORMATION. Information about the institution, lodging and dining facilities, and other features of the local area is extremely useful in helping attendees to make personal decisions about what they will do and what they will bring. References should be made to handicap accessibility in the information

provided for the meeting.

c. CALL FOR PAPERS. The Call-for-Papers (also referred to as *Abstract Submission*) should include a description of the format for the actual abstract (authors, addresses, title, and abstract) as well as the format for presentation in its final form (oral or poster). Electronic submissions by email or via the online registration system should be required. For poster presentations, precise instructions regarding poster format, dimensions, attachment, etc. must be provided with the registration information. The Call-for-Papers should be made electronically.

d. REGISTRATION FORMS. The Registration Forms should be simple and clear, yet provide sufficient information to assist the Local Organizing Committee in planning the meeting. It is appropriate to ask registrants to specify any restrictions such as food allergies and physical impairment. This information may assist in selecting facilities and meals.

9. PROCESSING REGISTERED INDIVIDUALS. When registration is handled online, information is normally databased automatically and receipts/confirmations are sent to the registrants within a few minutes. Effort should be made to accept major credit cards to facilitate payments, particularly for non- domestic attendees.

10. ESTABLISH MEETING SCHEDULE AND DEADLINES. It is important to establish realistic schedule and deadlines for the meetings to maintain control and to monitor progress of activities. These working parameters are needed for the Local Organizing Committee as well as the attendees. Dated online registration records, are the best way to determine if attendees have made a deadline. See sample Planning Schedule in the Appendix.

a. ABSTRACTS FOR PRESENTATIONS. It is advisable to aim to get abstracts for all oral and poster presentations at least three months before the meeting. The Local Organizing Committee may wish to take advantage of available online registration system to handle abstract submission. This also applies to abstracts from special speakers.

It would also be useful to generate an author index to the relevant page(s) of the Abstracts and include the relevant session an abstract or poster will be presented in. It is the LOC's right to refuse or accept a paper or poster on the basis of quality of content.

b. EARLY REGISTRATION. It is the decision of the host institution to determine the deadline for early registration benefits. Normally, this deadline will be early enough to allow the host institution to plan the meetings according to the numbers of expected attendees. However, the deadline should be about six to eight weeks after the registration information are distributed to allow for any delays. It might be wise to use the deadline required for reserved accommodations and abstract submission as the early registration cut-off, in order to avoid too many deadlines.

11. PREPARE AND PRINT PROGRAM AND ABSTRACTS.
- Plan to allow at least **two to three months** before the meeting to prepare and print the Program and Abstracts. One month may be needed for getting last-minute abstracts and late advertiser submissions, then setting up the pages for

the printer. Once all of the abstracts are received and plans and schedules have been confirmed, the Program and Abstracts can be prepared in a few days.

- Be sure to proof-read the copy several times prior to submitting the final version to the printer to avoid embarrassing errors. Electronic submissions from authors should help to avoid some problems, so taking advantage of online submission systems cannot be over-emphasized. Strive for consistency. Misspelled names, altered institution names, and heading errors are particularly easy to overlook.
- The second month is needed to accommodate the printer's schedule and still leave enough time to include the publication with the other materials handed out to registrants at the registration desk. Be sure to maintain good communication with the printer to insure the published document is ready on schedule and in the desired form.

12. NOTIFY PRESENTERS OF SCHEDULE. Individuals giving oral or poster presentations should be informed of their schedule in the program, preferably before the meeting.

13. PREPARE REGISTRATION MATERIALS. As soon as the Program and Abstracts document and supplementary materials are available, they may be sorted and placed in envelopes, folders or bags for distribution at registration desk. Each registrant should receive a copy of the Program and Abstracts, a name badge that is correct and legible at a distance, receipts for fees paid (if not available online), tickets for special events, housing information (if handled through the host institution), and special messages. Supplementary information for registrants might include maps, information about public transportation, a list of local dining facilities, tourist information, a list of useful telephone numbers (medical and emergency dental assistance, police, taxi, etc.), and brochures from selected sponsors and vendors (see the *Sponsorship Opportunities* document in the Appendix for level-specific benefits).

14. MAKE A DETAILED SCHEDULE OF MEETING ACTIVITIES. To avoid a breakdown in the communications among members of the Local Organizing Committee, it is a good idea to prepare and distribute a detailed schedule of all meeting activities for each hour of each day. Information about each activity, such as objectives, individuals concerned, and materials needed, should be included. This information should be distributed to at least the Chairs of the Subcommittees as well as other involved institution personnel, such as security, custodial services, and public relations.

15. PREPARE DIRECTORY OF REGISTRANTS. The preparation of the Directory of Registrants is easily produced if a database contains all the registration information. This may no longer be legal in some locations --- check the privacy law to assure that this is allowable and what type of information personal can be published. Asking registrants to accept publication of their personal information (i.e., tick box on the registration form, with explicit statement about right to privacy) is a normal procedure to obtain permission. Be sure the name, address, phone number, and e-mail addresses of each registrant are correct. Final entries to the registration directory are usually be made during the second day of the meetings. After the final version of the Directory is completed, it can be made available to the registrants, in electronic or printed form, if allowable by local law. If general distribution is prohibited locally, the listing should be provided to SPNHC for restricted use by the Membership Committee, the Publications Committee, and for archival purposes.

16. BE PREPARED TO SUPPLY SIGN LANGUAGE INTERPRETER. Hosts should check into the necessity of supplying sign language interpreters in their location. For example, host institutions in the U.S. will likely be obligated to meet the requirements of the Americans with Disabilities Act. This can be a costly endeavor and requirements and responsibilities should be investigated as early as possible in the planning process since the cost of such arrangements must be factored into registration or negotiated with the host institution. **The need for a sign language interpreter should be stated on the registration form**.

V. CONDUCTING THE ANNUAL MEETING

A. REGISTRATION
Registration usually begins during the afternoon of the day before the beginning of the actual meetings. There should be facilities (e.g., registration desk) and a sufficient number of LOC members to quickly process attendees as they arrive. Most participants should have pre-registered by that time. Allowance should be made for last minute registration at the desk; if an online system is used, a computer with access to the system and a printer should be available at the desk to process new registrations and payments. Although it is impractical to exclude non-registered individuals from the general activities of the meetings, they should not receive registration materials or have the benefit of attending workshops, tours, or other special functions without sharing with the costs of such activities.

B. COUNCIL/COMMITTEE MEETINGS

1. INITIAL MEETINGS.

> a. SPNHC Committee meetings are scheduled at the beginning of the meeting. Do not schedule in conflict with other activities (see sample schedules in the Appendix).

> b. Work closely with Secretary and Committee Chairs to develop the schedule. Check for conflicting committee membership and desired length of time for each meeting. Work with President to see if there are any special sessional committees that need to meet. Note that not all SPNHC committees meet.

> c. Provide a comfortable space, with adequate room, adjacencies, and good wifi.

2. COUNCIL MEETING. The Council Meeting is typically scheduled sometime after Committee Meetings and before the Annual Business Meeting.

C. ANNUAL BUSINESS MEETING
The Annual Business Meeting (ABM) must be scheduled on the last day of the conference, usually on the latter part of that day. The Local Organizing Committee will be asked by the Secretary to arrange the local printing and delivery of documentation for the ABM, consisting of a package averaging 40 pages. This can be printed double sided, in black, on recycled paper, and corner stitched, 50 copies (at the most). Since the document will be available on the Society's website, fewer copies are printed than the number of expected attendees. Recycling bins may be placed at the meeting room exits for cast-off copies. Note that if scheduled during lunch time, providing food helps ensure members attendance and requirement to meet the quorum. Contact the SPNHC Secretary to obtain specific details.

D. PRESENTATIONS

Sessions for oral presentations will require a Session Chair or Moderator to introduce speakers, keep the session on schedule, and to serve as a time-keeper for individual speakers. The Chair will need a timer and a method for communicating time to speakers. If at all possible the room for presentations should allow individuals to easily enter and exit without disturbing the presentations. Because of the problems of monitoring and controlling attendees it is not worth the effort, frustration, or embarrassment to restrict attendance at regular presentations.

1. OPENING SESSION. The opening session is usually scheduled the day after Field Trips and Tours. It starts in the morning with the welcoming address from representatives of the host institutions(s), followed with welcoming words and brief announcements by the SPNHC President. These are usually short introductory comments since much of the time should be allocated for the keynote presentation, which can run for 1-1.5hrs. Other invited speakers for the opening session may not have much more than 20 minute each, depending on the number of speakers and the time available.

2. ORAL. Oral presentations should be given in a setting where the speaker can easily address the entire audience. These presentations are usually restricted to 15-20 minute time periods including three to five minutes at the end for questions. Sessions should be kept on schedule by an assigned moderator. Proper AV equipment, along with laser pointer, screen, sound system and variable light control should be available. For general sessions, it is recommended to have extra microphones for audience questions, especially when presentations are in large rooms. The use of chalk boards and posters in the oral sessions is not permitted.

3. POSTER/DISPLAYS. Posters and displays should be presented in a setting where attendees can comfortably view and move around, even in a crowd. A block of time must be scheduled when the presenters will be expected to be standing by their posters so that attendees can have the opportunity to discuss the presentations. Consider hosting a dedicated poster session without additional concurrent offerings. In order to attract sponsoring partners to our meetings, it is important to situate the poster sessions, the tradeshow area and break room in close proximity.

E. SPECIAL SESSIONS.

If special sessions limit the number of attendees, such activities should give priority to registered individuals. If any activities involve local transportation, be sure that there is insurance coverage in case of accidents.

1. SYMPOSIA. A symposium is considered a special activity because it usually involves an organized series of presentations on a particular subject. It should not be in conflict with any other activity of the meeting. Symposia are normally treated in a similar manner as oral presentations (see Section D). Symposia can be scheduled as an evening or all-day activity.

2. SPECIAL INTEREST GROUPS. SIGs are open-format meetings where participants have the opportunity to discuss a variety of subjects, but often recurring ones such as fluid-preserved collections, transport of dangerous goods, collection management

databases). These subjects should be determined as early as possible and included on the conference website and in the Program and Abstracts, along with a brief but clear outline of the issue(s) to be discussed so that participants can be fully aware of what to expect. Sign-ups for the SIGs can be done as part of the online registration process or at the beginning of the conference.

3. WORKSHOPS/ COLLECTION TOURS. For overall scheduling purposes and to provide breaks, it is convenient to plan workshops and tours in standard 90-120 minute blocks of time. Although this will usually allow two in the morning and two in the afternoon, it also offers some flexibility for half blocks or double blocks that may be required for some activities. There should be enough activities to accommodate all registrants at all times during the day. Experience has shown that good workshops and tours tend to use all time available. Workshops have often taken a whole day, sometimes two. Individuals in charge of workshops or tours should be very conscious of the schedule requirements. Be sure to allow enough time between activities for attendees to get to the next one. Individuals in charge of tours should have a list of names for individuals expected on the tour in case it is necessary to wait a few minutes for late arrivers. Workshops are usually organized in cooperation with the Professional Development Committee.

F. BREAKS & LUNCHES

A 20-30 minute health/refreshment break should be scheduled in the middle of the morning and of the afternoon presentation schedule. Lunch breaks should be at least 90 minutes.

G. SOCIAL ACTIVITIES.

If social activities are to be held outdoors, there should be contingency plans in case the weather turns bad.

1. ICE BREAKER SOIRÉE. The Ice Breaker Soirée takes place during the evening before the first day of presentations, usually after the Field Trips and Tours. The occasion should be simple but in a setting conducive to casual interaction among attendees. Beverages and snacks/hors d'oeuvre are normally available.

2. DINNER. The Dinner (also called Banquet) may involve a casual dinner and an evening activity. In the past, when other activities have been included, they have ranged from entertainment to touring museum exhibits or zoological gardens. Opening the floor to dancing after the meal is traditional.

3. SPONSORING PARTNER RECEPTION
A reception with the sponsoring partners held in the tradeshow is a good way to ensure quality interaction between conference attendees and partners. Quality interaction generates interest in ongoing sponsorship by partners.

4. OTHER. Each meeting site has its own unique setting and other arrangements may be organized at the discretion of the Local Organizing Committee. At a minimum, it would be helpful if facilities could be suggested for attendees to gather at the end of the day to socialize.

VI. POST-MEETING ACTIVITIES

A. ACKNOWLEDGMENTS
Sending out letters of appreciation to individuals that assisted with the Annual Meeting, including thank you notes to sponsoring partners and special speakers, is among the most important post-meeting activities. Although contributors of funds or materials are the most obvious to be acknowledged, do not forget the individuals on the Local Organizing Committee or other people who provided services in one way or another. If acknowledgments were to be sent to individuals that helped develop the program with presentations, it would be appropriate to encourage those individuals to prepare their contributions for submission to *Collection Forum*. It may be appropriate to coordinate this activity with the SPNHC Managing Editor.

B. DISTRIBUTION OF PROGRAM AND ABSTRACTS TO NON-ATTENDING SPNHC MEMBERS
Call-for-Papers should include the option to purchase a copy of the Program and Abstracts, for a reasonable sum based on cost estimates for this publication. The intention to purchase the program must be made by a pre-set deadline or the Local Organizing Committee is under no obligations to provide copies. The Program and Abstracts may be posted on the website after the conference, precluding the need to include this option.

C. CONCLUSION OF FINANCIAL ARRANGEMENTS.

1. INSTITUTION. Conclusion of all financial obligations of the host institution may require several months. The final obligation of the institution may be to pay taxes on certain funds received as a result of the meeting.

2. SPNHC expects the re-payment of any money loaned to the host institution for "start-up" expenses within 6 months of the conclusion of the meeting. If excess income is derived from the meetings, SPNHC would appreciate a contribution of some or all of these funds. Such funds help to cover any anticipated expenses resulting from activities of the Annual Meeting (for example, special publications such as *Managing the Modern Herbarium*) and support graduate students or emerging professionals attendance at annual meetings. However, under no circumstance can SPNHC be involved with income that would jeopardize its tax-free status.

D. SUBMIT FINAL REPORT TO SPNHC COUNCIL.
A final report of the annual meeting should be sent to the SPNHC President who will in turn distribute copies of the report to other Council members. This report will be maintained as a permanent document of the Society and be used in planning future meetings. The report should include a summary of activities accomplished, a breakdown of numbers of registered participants (for example, members, non-members, internal, external, etc.), a listing of registration charges, and recommendations for future meetings or changes in guidelines. Although there is no obligation of the host institution to explain financial details, any information regarding general costs would be helpful to other institutions that may be interested in hosting future meetings. It would also be extremely helpful to update information, such as sponsoring partner lists, news release contacts, and institutional mailing addresses that were used during the planning process. A Conference Summary Report should be submitted to the SPNHC Executive within 12 months after the end of the Annual Meeting.

Last updated: October 2019

VII. APPENDICES

APPENDIX I - Previous Meetings

Websites are snapshots taken from the WayBack Machine (http://archive.org/web/).

SPNHC 2007 – Building for the Future: Museums of the 21st Century – May 21-26, 2007. Science Museum of Minnesota, Saint Paul, MN.
http://web.archive.org/web/20090525051813/http://www.smm.org/spnhc/

SPNHC 2008 – Collection Stewardship: Challenges in a changing world – May 13-17, 2008. Sam Noble Museum of Natural History, Oklahoma City, OK.
http://web.archive.org/web/20091221042321/http://www.snomnh.ou.edu/nsca-spnhc/

SPNHC 2009 – Bridging Continents: New Initiatives and Perspectives in Natural History – July 6-11, 2009. National Museum of Natural History Naturalis, Leiden, The Netherlands.
http://web.archive.org/web/20140106070611/http://spnhc2009.org/

SPNHC 2010 – Biodiversity 2010 and Beyond: Science and Collections – May 31 – June 5, 2010. Canadian Museum of Nature, Ottawa, Ontario, Canada.
http://web.archive.org/web/20100423074434/http://www.spnhc-cba2010.org/home.html

SPNHC 2011 – Sustainable Museums – Sustainable Collections – May 23-28, 2011. California Academy of Sciences, San Francisco, CA.
http://web.archive.org/web/20110131004040/http://research.calacademy.org/spnhc

SPNHC 2012 – Emerging Technology and Innovation in Natural History Collections management – June 11-16, 2012. Yale Peabody Museum, New Haven, CT.
http://web.archive.org/web/20120604091144/http://peabody.yale.edu/collections/spnhc2012/home

SPNHC 2013 – Repositories and Partnerships for Managing Natural History Collections in the 21st Century – June 17-22, 2013. South Dakota School of Mines and Technology, Rapid City, SD.
http://web.archive.org/web/20130510013534/http://cfrspnhc2013.com

SPNHC 2014 – Historic Collections / Future Resources – June 22-27, 2014. National Museum of Wales, Cardiff, Wales.
http://web.archive.org/web/20150922031000/http://www.museumwales.ac.uk/spnhc2014/

SPNHC 2015 – Making Natural History Collections Accessible through New and Innovative Approaches and Partnerships – May 17-23, 2015. The Florida Museum of Natural History, Gainesville, FL.
http://web.archive.org/web/20160216211444/http://www.spnhc.org/media/assets/SPNHCProgramforWeb.pdf

SPNHC 2016 – The Green Museum – June 20-25, 2016. The Museum für Naturkunde and Botanischer Garten und Botanisches Museum Berlin, Germany.
http://www.spnhc2016.berlin/

Last updated: October 2019

APPENDIX II – SAMPLE DOCUMENTS

Committee Meetings

Please note that this is just an example; please consult the Executive committee before assigning any time slots for committee meetings.

Duration (hrs)	Time	Room 1	Room 2	Room 3
1,25	08:30	Mentorship	Ethics	
0,25	09:45	Coffee Break		
1,25	10:00	Best Practices	Professional Development	
1,25	11:15	Long Range Planning	Documentation	
0,75	12:30	Lunch included		
1,25	13:15	Membership	Conservation	Legislation & Regulations
1,25	14:30	Publications		
0,25	15:45	Coffee Break		
1,25	16:00	Web	Conference	
---	17:15	End of Committee Meetings		
3	18:00	Council Meeting (Supper Included)		

Program At-A-Glance

Example from the 2010 SPNHC & CBA/ABC Joint Meeting

	Wednesday • 2 June 2010 • Morning
08:30 - 09:00	**ByTowne Cinema - Announcements & Welcome** (DiCosimo, LaLonde, Rabeler, Evans, Gagnon) (Chair: Gagnon)
09:00 - 10:00	**Keynote Speaker: Paul Hebert - A Census of All Life**
10:00 - 10:40	**Break (40 min)**
10:40 - 12:00	**Panel on Biodiversity Informatics Megastrategies: A Global Vision** (Chair: J. Macklin) -- Walter Berendsohn, EDIT Guy Baillargeon, Encyclopedia of Life (EOL) Anne Bruneau, CANADENSYS Vishwas Chavan, GBIF John R. Wieczorek, American Bioinformatics Initiatives

	Wednesday • 2 June 2010 • Afternoon		
12:00 - 02:00	**Lunch @ SPNHC SIG Meetings**	**Lunch @ CBA Section Meetings**	
02:00 - 02:10	**SPNHC: Collections Digitization (Chair: Chris Norris) Room 1160**	**Symposium: Dispersal in Fungi and Plants (Chair: Hugues Massicotte) Room 1140**	**Systematics Contributed Papers (Chair: Julian Starr) Room 1150**
02:10 - 02:30	Ford - A comprehensive look at data digitization and mobilization in a natural history museum: Challenges and initiatives at the Museum of Comparative Zoology, Harvard University	Seifert – The grey zones of microbial dispersal: The importance of collections, databases and taxonomists for understanding biological invasions (40 min)	Allen - The tortoise and the hare: contrasting phylogeographic patterns in western North American species of *Bistorta* (Polygonaceae).
02:30 - 02:50	Molineux - An inventory for all seasons: methods for gathering data using volunteers		Ciotir - Phylogeography of *Bartonia* species in North America and conservation implications of branched *Bartonia*, a possible new species for Ontario
02:50 - 03:10	Waddington - Flat file to relational: The evolution of a type catalogue of invertebrate fossils	Lachance - Floricolous Yeasts and the Microbial Ubiquity Model (40 min)	Dickinson - What is Suksdorf's hawthorn (*Crataegus suksdorfii*)?
03:10 - 03:30	Slawski - High-throughput digitization of museum source documentation		Sokoloff - Systematics and conservation of Fernald's Milkvetch: cpDNA, AFLPs and morphometric analyses do not support taxonomic recognition.
03:30 - 04:00	**Break (30 minutes)**		
	Tabaret Hall 3rd Floor	**Room 1140**	**Room 1150**
04:00 - 04:20	**SPNHC Poster Session**	Windham – A peek inside the black box: investigating factors affecting long- distance dispersal and sporophyte establishment in seed-free vascular plants (40 min)	Babineau - Phylogeny and biogeography of endangered Malagasy legumes: the genus *Delonix*
04:20 - 04:40			Lo - The associations of biogeography and reproductive system with fruit color polymorphism in the Himalayan Mountain-ash (*Sorbus*; Rosaceae).
04:40 - 05:00		Ackermann – The physical ecology of pollen dispersal (40 min)	Wright - The evolution of reproduction in *Cuscuta*: a glimpse into the sex lives of parasitic plants
05:00 - 05:20			Elisens - Ethnobotany of the southern plains: Plant usage among the Kiowa, Comanche, and Plains Apache
05:30 - 06:30		Ecology Discussion: Re-introduction: when, where and how? 5:30 PM @ The Royal Oak on Laurier	Teaching Section Meeting - Tabaret Room 319
06:00 - 10:00	**SPNHC Mixer - VMMB**		

	Thursday • 3 June 2010 • Morning			
08:30 - 8:40	**SPNHC - Collections and the Web (Chair: Andy Bentely) Room 1160**	**SPNHC - Digitizing Initiatives (Chair: Richard Sabin) Room 1030**	**CBA-ABC Systematics Symposium -- Roles and Status of Canadian Herbaria (Chair: Tim Dickinson) Room 1140**	**CBA-ABC Plant Development Contributed Papers (Chair: Arunika Gunawardena) Room 1150**
08:40 - 9:00	Norris - Web 2.0, social networking, and the future of on-line collections access	Peters - The Global Plants Initiative (GPI) and the California Academy of Sciences	Berbee -- Capturing the missing diversity among BC fungi and a plan to build understanding of fungal belowground ecology	Lord - The lace plant: a new model organism to study both developmental and induced programmed cell death
09:00 - 9:20	Hoffman - Introducing CollectionSpace, a collection management system and foundation for research	Mishler -The Jepson Flora Project and the Consortium of California Herbaria	McDevit - Acquiring DNA sequence data from dried archival (type) red algal collections for the purpose of applying specific epithets to contemporary molecular species: a critical assessment	Rantong - Isolation of cDNAs of genes involved in programmed cell death (PCD) in lace plant (*Aponogeton madagascariensis*)
09:20 - 09:40	Prather - CollectionsWeb Update: Building a Community of Natural History Collections	Zetzsche - DNA Bank Network – Referencing DNA with specimens, sequences and publications based on GBIF web services	Cayouette - Changing values of Canadian herbaria from the 19th to the 21stcentury	Lyssa - The fortuitous observation of endophytes in the dwarf mistletoe *Arceuthobium americanum*
09:40 - 10:00	Colosi - Re-curating the fluid-preserved mammals of the Yale Peabody Museum of Natural History: Methods and discoveries		Metsger - Tapping the international herbarium network to 'plant' Life in Crisis: the Schad Gallery of Biodiversity, at the ROM	Ross Friedman - Identification of a gender-specific marker in the dwarf mistletoe (*Arceuthobium americanum*) using random amplified polymorphic DNA (RAPD) analysis
10:00 - 10:40	**Break (40 min)**			
	SPNHC Collection Management I (Chair Ann Molineux) Room 1160	**SPNHC: GBIF Discussion Session (Chair: Vishwas Chavan) Room 1130**	**Room 1140**	**Room 1150**
10:40 - 11:00	DeMouthe - Storage and documentation of gemstones & other precious objects		Cota-Sanchez - Herbarium data management and display using Specify: SASK collection as example	Macdonald - Nodule development in E151 (sym15), a low-nodulation pea mutant
11:00 - 11:20	Kerbey - Keep, cut or pour into the foundations - Why preserve rock collections?	Towards demand-driven publishing of Natural History Collections Data: Recommendations of the GBIF GSAP-NHC TG Chavan, Vishwas	Barkworth - Herbaria - of value beyond systematics	Al Khateeb - In vitro propagation and characterization of phenolic content, antioxidant and antimicrobial activity of *Cichorium pumilum*, an endangered medicinal plant from Jordan
11:20 - 11:40	Palumbo - Conservation issues within natural history collections: The restoration of colour		Brouillet - Assessing the state and trends of biodiversity sciences (taxonomy and collections) in Canada: An introduction to the Council of Canadian Academies' Expert Panel process	**CBA-ABC Mycology Contributed Papers:** Lim -- Phylogenetic structure of ectomycorrhizal fungal communities of western hemlock on northern Vancouver Island changes with forest age and stand type
11:40 - 12:00	Harding - Birds, beasts and botanicals: identifying organic materials in ethnographic collections		Sears - How Canadian herbaria are being utilized in the 21st century	Piercey-Normore - Biodiversity of species and natural products of lichen-forming fungi in the genus *Cladonia*.
12:00 - 1:30	**SPNHC & CBA-ABC Lunch (Vendors' Lunch) Tabaret Hall Chapel**			

	Thursday • 3 June 2010 • Afternoon			
01:30 - 01:40	**NSERC session Room 1120**	**SPNCH DemoCamp (Chair: Amanda Neil) Room 1130**	**CBA-ABC Symposium: Plant InsectInteractions (Chair: Art Davis) Room 1140**	**CBA-ABC Ecology & Conservation Contributed Papers: (Chair: Arthur Fredeen) Room 1150**
01:40 - 02:00	St-Onge - NSERC Program News and 2010 Discovery Grant Competition Results (20 min)	Lafferty - SALIX, a semiautomatic label information extraction system using OCR	Jetter - Slippery plant surfaces: from chemistry to ecology (40 min)	Paradis - The "mire-forest" transition in raised bogs of eastern Canada: identification of ecotonal species'
02:00 - 02:20		Best - A framework and workflow for extraction and parsing of herbarium specimen data		Fredeen - Epiphytic macrolichen diversity in subboreal British Columbia
02:20 - 02:40	NSERC Workshop: How to prepare a Discovery Grant application (1 hour)	Rios - Georeferencing natural history collections data Using GEOLocate	Davis - Flower development and nectar production in relation to insect pollination (40 min)	Kobylinski - Epiphytic N2-fixing cyanolichens: Important spokes in the wheel of diversity, but what to the nitrogen cycle?
02:40 - 03:00		Wieczorek - Georeferencing Natural History Collections with BioGeomancer		Jones - Mixed-mating plant responds positively to climate extremes
03:00 - 03:30	**Break (30 minutes)**			
	SPNHC-Collection Management II (Chair Jean DeMouthe) Room 1120	**SPNCH DemoCamp cont'd (Chair: Amanda Neil) Room 1130**	**Room 1140**	**Room 1150**
03:30 - 03:50	McAlister - Biodiversity, Collections and The Natural History Museum - An Interactive Approach	Ung - Xper²: introducing e-Taxonomy.	Shorthouse - Manipulation of plant development by cynipid wasps attacking Canada's wild roses (40 min)	Waterway - Quantitative comparisons of *Carex* seed banks in old-growth forest, using nuclear ribosomal spacers as DNA barcodes to identify seedlings
03:50 - 04:10	Allen - Long term storage method for oversized anthropology collections	Bentley - Specify 6 innovation and collaboration		Da Silva - Influence of an invasive plant species on plant pollinator interactions: Evidence for facilitation
04:10 - 04:30	Watkins-Colwell - Something's Fishy at the Peabody: The Ichthyology Collection at the Yale Peabody Museum of Natural History	Riccardi - Integrating specimens, images, and ontologies	**CBA-ABC Floristics:** Gillespie - Plant collecting by canoe: botanical explorations of Tuktut Nogait National Park and vicinity, Northwest Territories.	Petersen - Assessing the efficacy of buffer strips in sustaining bryophyte diversity in montane forests in the BC Interior.
04:30 - 04:50	Brunel - The Institut québécois de la biodiversité (IQBIO) and Quebec's natural history collections	Macklin - Herbarium Networks Part IV: Demonstration of a prototype web interface for a 'Filtered Push' network to enable discovery, filtering, and annotation of botanical and other natural history specimen data.	**CBA/ABC Annual General Meeting Room 1160**	
04:50 - 05:30				
06:00 - 10:00			**CBA-ABC Mixer – VMMB**	
06:00 - 11:00	**SPNHC Banquet Unicenter Cafeteria**			

	Friday • 4 June 2010 • Morning			
08:30 - 08:40	**SPNCH: Digitizing Herbaria (Chair: Gregory Watkins-Colwell) Room 1120**		**CBA-ABC Teaching Section (Chair: Cindy Ross Friedman) Room 1140**	**CBA-ABC Symposium - Global Plant Conservation (Chair: Danna Leaman) Room 1150**
08:40 - 09:00	Doran -Preserving GOD: Curatorial and digitization challenges in the Charterhouse School Herbarium.		Frego - Calling or culling: the influence of our teaching metaphors (40 min)	Hendrickson - The once and future strategy: the global response to the plant conservation crisis
09:00 - 09:20	Tse - Catharine Parr Traill Scrapbook: Microfade testing of Herbaria Collection and Exhibition Decisions			Galbraith - Canada's Response to theGlobal Strategy for Plant Conservation
09:20 - 09:40	Poncy- An overview of the renovation of the Paris Herbarium		Dalrymple - Cleaning up: making soap with plant materials	Small - Superstar plants as a key to public and political support for conservation
09:40 - 10:00			Fredeen & Young - BIOL 304: A new upper division plant structure and function course with a society and environment context	Farr - CITES as a tool for sustainable use of plants
10:00 - 10:40	**Break (40 min)**			
	SPNCH: Digitizing Herbaria cont'd (Chair: Gregory Watkins-Colwell) Room 1120	**SPNHC: Virtual Herbarium (Chairs: J. Macklin & R. Rabeler) Room 1130**	**Room 1140**	**Room 1150**
10:40 - 11:00	Doran - Cataloging Hidden Archives . . .	Macklin & Rabeler - How will we digitize the 70 million+ plant specimens housed in United States herbaria?		Davis - The CBD in practice: challenges for collections and research
11:00 - 11:20	Morin - The Biodiversity Heritage Library: 28 million pages of taxonomic literature & you			Open Discussion
11:20 - 11:40	Sweeney - Digitization workflow in the Yale University Herbarium	Discussion session: Follow-up to Macklin & Rabeler "Developing a digital U.S. biological collections national resource: First steps towards a strategic plan" and "US Virtual Herbarium" [1 hour]	Teaching Panel (1 hour 20 minutes)	**CBA-ABC Ecology & Conservation Symposium (Chair: Adrianne Sinclair)** Catling - Three BIG QUESTIONS about databasing natural history collections
11:40 - 12:00	Campbell - DNA and tissue banking at The New York Botanical Garden			Doubt - The Cutlery Moss and other capers: Managing the herbarium for species conservation
12:00 - 02:00	**SPNCH Annual Business Meeting (Lunch Included) Room 1160**		**CBA/ABC Poster Session with judges (Lunch Included) Tabaret Hall 3rd Floor**	

	Friday • 4 June 2010 • Afternoon			
02:00 - 02:10	**SPNHC: Digitizing Invertebrate Collections (Chair: Tim White) Room 1160**	**Room 1130**	**CBA-ABC Systematics Contributed Papers (Chair: Laurie Consaul) Room 1140**	**CBA-ABC Ecology (continued from a.m.) Room 1150**
02:10 - 02:30	Morris - Imaging and innovative workflows for efficient data capture in an Entomological collection: The MCZ Lepidoptera Rapid Data Capture Project.	Consortium of Northeastern Herbaria Meeting	Rodrigues - Molecular systematics of the parasitic genus *Conopholis* (Orobanchaceae)	Vasseur - Changes in plant communities: approaches to visualize spatial or temporal changes.
02:30 - 02:50	Sikes - Digitization of the University of Alaska Museum Insect Collection		Fazekas - Community structure of arbuscular mycorrhizal fungi (AMF) on root tissue identified by DNA barcoding	Nault - SEM'AIL: a public restoration program for wild leek (*Allium tricoccum* Ait.) in Quebec; a species threatened from overharvesting.
02:50 - 03:10	Mayer - How (and how not) to survey a systematic invertebrate paleontology collection for locality data		Chouinard - A practical test of DNA barcodes for identifying the Cariceae (Carex & Kobresia, Cyperaceae) of North America, north of Mexico	Lyashevska - What does it mean to value biodiversity?
03:10 - 03:40	**Break (30 minutes)**			
	SPNHC: The Lighter Side (Chair: Judith Price) Room 1160	**Room 1130**	**Room 1140**	**Room 1150**
03:40 - 04:00	Dougherty - The History of Paleontology at the Geological Survey of Canada	Continued: Consortium of Northeastern Herbaria Meeting	Kuzmina - A DNA Barcode reference library for the vascular plants of Churchill, Manitoba	Bérubé - How paleoecological tools can help planning restoration projects?
04:00 - 04:20	DeMouthe - Reverend James Downstream: A pioneer in early natural history collecting		Saarela - DNA barcoding the vascular plant flora of the Canadian Arctic	Pouliot - Is there a link between the presence of vascular plants and the initiation of *Sphagnum* moss hummocks in bogs?
04:20 - 05:20	KE Emu NHSIG Room 1120	**Ernie Brodo -- Weresub Lecture (1 hour) "Travels with a Lichenologist" Room 1160**		
05:20 - 06:20			**CBA-ABC Incoming Executive Meeting - Tabaret Room 309**	
06:00 - 09:00	**SPNHC Council Meeting Tabaret Hall Chapel**			
06:00 - 11:00			**CBA-ABC Banquet Unicenter Cafeteria**	

Sample Program Content

Table of Contents

* XXXXX: name of other organization in a joint meeting.

Sample letter Of Invitation

DENVER MUSEUM OF
NATURE & SCIENCE

April 29, 2014

Andrew Bentley
SPNHC Conference Committee Chair and President-Elect
University of Kansas Biodiversity Institute
Dyche Hall
1345 Jayhawk Boulevard
Lawrence, KS, 66045-7561

Dear Mr. Bentley,

It is our pleasure to invite the Society for the Preservation of Natural History Collections to Denver in 2017, and to offer the Denver Museum of Nature & Science as the local host for the Society's 32nd annual meeting. Kelly Tomajko will chair the local organizing committee that will include Museum staff who are active participants in the Society's annual meetings and activities.

The Museum has just completed construction of the Rocky Mountain Science Collections Center, a state-of-the-art collection facility. What makes this facility unique is the Museum's commitment to reducing its carbon footprint. The Center is designed to receive LEED Platinum certification by the U.S. Green Building Council, the highest rating possible for new construction. Highly efficient, the building will use 50% less energy than a standard building of its type by incorporating unique heat pump technology and other sustainable strategies.

Conveniently located, Denver is the gateway to both the Rocky Mountains and the eastern plains. It has a great deal to offer those who wish to explore its vibrant cultural community as well as those who are interested in more remote areas of Colorado. We believe this is a perfect setting to discuss sustainable preservation of natural history collections.

The local organizing committee, with our full support, is eager to host this conference and are standing by to initiate the necessary work should the Society accept this invitation.

Sincerely,

Scott D. Sampson, Ph.D.
Vice President and Chief Curator
Research & Collections Division

Kelly Tomajko
Director of Collections Operations
Research & Collections Division

cc: Chris Norris, SPNHC President
        Tim White, SPNHC Sponsor Liaison
        Judith Price, SPNHC Secretary

2001 Colorado Blvd.
Denver, CO 80205-5798
P 303.322.7009
F 303.331.6492

www.dmns.org

Sample Planning Schedule

SPNHC 2017 Planning Schedule:
July 2015: secure conference venue
August, 2016
- August 1: deadline for SPNHC Fall Newsletter

October, 2016
- October 3: call for abstracts
- October 3: initiate Sponsoring Partner solicitations

January, 2017
- January 13: Early Bird registration opens
- January 13: abstracts due; travel grant applications due
- January 15: review abstracts
- January 15: deadline for ordering conference bags

February, 2017
- February 1: deadline for SPNHC Spring Newsletter

March, 2017
- March 1: conference deposit and damage deposit due to value accommodation
- March 15: sessions selected and speakers notified; travel grant recipients notified

April, 2017
- April 1: deadline for submitting print ads for program
- April 15: early bird registration deadline
- April 27: edited program content due for layout and printing

May, 2017
- May 10: deadline for regular registration and deadline to cancel registration for a refund
- May 15: deadline for final menu selections to conference hotel
- May 15: deadline for making changes to bus reservations
- May 16: deadline for providing conference program, room assignments, and room sets to conference hotel
- May 16: deadline for final roster of guests to value accommodation
- May 18: deadline for booking guest rooms at conference hotel
- May 18: deadline for assigning concessions at conference hotel

June, 2017
- June 1: materials ready to pack conference bags
- June 1: assemble badges and ribbons
- June 1: Sponsors notified of tradeshow table location
- June 1: deadline for submitting signed catering event orders to conference hotel
- June 1: guaranteed number of guest rooms at conference hotel must be booked by attendees or billed to LOC
- June 1: deadline for making free changes to AV equipment
- June 15: deadline for assigning complementary rooms at conference hotel
- June 15: packages and pallets for Sponsoring Partner tradeshow MAY NOT arrive before this date

July, 2017
- Pay outstanding invoices
- Submit Final Conference Report to SPNHC Council

Last updated: March 2016

Sample Schedule at a Glance

Day	Main Activities
Sunday, June 18	Workshops
Monday, June 19	Workshops
Tuesday, June 20	Opening Welcome and Plenary Session Committee Meetings Ice-Breaker Reception
Wednesday, June 21	Technical Sessions Sponsoring Partner Trade Show and Reception Poster Session Emerging Professionals Luncheon Council Meeting
Thursday, June 22	Technical Sessions Sponsoring Partner Trade Show Demo Camp Banquet
Friday, June 23	Annual Business Meeting Special Interest Groups Collection Tours
Saturday, June 24	Field Trips

Sample Budget

Category	Detail	Description	Budget
Revenue			**($212,479.50)**
	Campus Village		**($9,149.50)**
		Damage Deposit	($854.50)
		Reservations	($8,295.00)
	Loan		**($5,000.00)**
		Loan from SPNHC	($5,000.00)
	Registration		**($138,330.00)**
		Banquet (250 people x $75)	($18,750.00)
		Field Trips (100 people x $50)	($5,000.00)
		Meeting Registration	($110,250.00)
		RTD Bus passes to DMNS	($330.00)
		Workshop Registration (75 people x $50)	($3,750.00)
		Campus Village Parking Passes	($250.00)
	Sponsorships		**($60,000.00)**
		All Sponsors	($60,000.00)
Expenses			**$210,367.53**
	Banquet at DMNS		**$17,100.00**
		Food & Beverage/AV/Security/etc. (250 people)	$13,500.00
		Entertainment (includes tip, food, drinks)	$3,600.00
	Campus Village		**$9,314.05**
		Auraria Campus Lodging	$9,314.05
	Contingency Expenses		**$10,017.50**
		TBD (5% of total budget)	$10,017.50
	Fieldtrip Expenses		**$879.00**
		Meals	$879.00
	Loan		**$5,000.00**
		Repayment of Loan to SPNHC	$5,000.00
	Registration Expenses		**$4,200.00**
		Paypal/Credit Card Fees (2.5% of registration fees)	$4,200.00
	Registration Supplies		**$9,300.00**
		Badges, Conference Bags, Water Bottles, etc.	$6,000.00
		Program Printing	$2,500.00
		Program Shipping	$800.00
	The Curtis - Conference Hotel		**$140,976.98**
		Internet Access Upgrade ($8.95/day)	$62.65
		No Show Fee ($199/night/room)	$4,975.00
		AV Services (external vendor)	$28,803.33
		Food & Beverage	$107,136.00
	Transportation		**$12,150.00**
		Bus Parking at Conference Hotel	$1,000.00
		Busses for Field Trips	$2,770.00
		Busses to Banquet at DMNS	$4,330.00
		Busses to Collections Tours at DMNS	$3,850.00

	Campus Village Parking Passes	$200.00
Workshop Expenses		**$1,430.00**
	Meals (40 $10 vouchers)	$600.00
	RTD Bus passes to DMNS	$330.00
	Supplies	$500.00
Grand Total		**($2,111.97)**

Society for the Preservation of Natural History Collections
2017 Annual Conference Dashboard

Overview
- **Dates:** June 18-24, 2017
- **Location:** Denver, Colorado, USA
- **Hosts:** Denver Museum of Nature & Science, Denver Botanic Gardens
- **Local Organizing Committee Chair:** Kelly Tomajko, Director of Collections Operations, Denver Museum of Nature & Science

Finance
- **Total Budget:** $204,157
- **Sponsorships Raised:** $70,731

Program
- Workshops: 11
- Poster presentations offered in 2 dedicated sessions: 45
- Oral presentations offered in 4 concurrent sessions: 116
- Special Interest Groups: 6
- Field trips: 4

Participants
- **Attendance:** 439
- **Student Volunteers Receiving Free Registration:** 15
- **Countries Represented:** 14 (Australia, Belgium, Canada, Czech Republic, Denmark, Egypt, France, Germany, Mexico, Netherlands, New Zealand, South Africa, United Kingdom, United States)
- **Registration Rates:**

PE TES	rly Jan 13-Apr 15	gular Apr 16-May 15	e May 16-Jun 20	gle Day Pass May 16-Jun 20
Registered	76%	9%	5%	10%
Member-Professional	$ 375	$ 425	$ 475	$ 175
Member-Student	$ 175	$ 225	$ 275	$ 125
Non-Member Professional	$ 450	$ 500	$ 550	$ 200
Non-Member Student	$ 250	$ 300	$ 350	$ 150
Student volunteer free	$ -	$ -	$ -	$ -

Rooms Picked Up

Dates	Conference Venue Rooms	Dorm Rooms
June 15	1	-
June 16	1	-
June 17	24	4
June 18	52	23
June 19	63	23
June 20	92	33
June 21	92	33
June 22	87	33
June 23	46	33
June 24	27	23
June 25	-	1

Sample Sponsorship Solicitation and Opportunities

Sponsorship & Tradeshow Participation
Society for the Preservation of Natural History Collections
2017 Annual Meeting

WHAT: The 32nd SPNHC Annual Meeting and Gala

WHERE: The Curtis, A Doubletree by Hilton, Denver, Colorado

WHEN: June 18-24, 2017

HOST: Denver Museum of Nature & Science and Denver Botanic Gardens

THEME: The Next Generation in Best Practices

Why Sponsor? Sponsors of the 2017 SPNHC Annual Meeting will enjoy increased access and exclusive privileges to interact with Society members, an international group whose mission is to improve the preservation, conservation and management of natural history collections to ensure their continuing value to society. SPNHC takes a leading role in promoting collections care issues to the academic community, governments, and the general public. Members are dedicated to training and mentoring the next generation of collections professionals. Collections professionals come from all over the world to attend SPNHC's annual meetings. SPNHC conferences encourage quality interaction between vendors and meeting participants in various ways— a formal exhibit hall, coffee breaks held in the exhibit hall, and a late afternoon cocktail reception held in the exhibit hall. The Curtis will conveniently accommodate all SPNHC meeting activities on one floor to maximize opportunities for attendees and vendors to interact.

Why Come to Denver, Colorado? Conveniently located, Denver is the gateway to both the Rocky Mountains and the eastern plains. It has a great deal to offer those who wish to explore its vibrant cultural community as well as those who are interested in more remote areas of Colorado. Colorado will be a popular destination for both pre- and post-conference travel. In addition to what will surely be a valuable program, we will offer tours of the recently constructed state-of-the-art Avenir Collections Center at the Denver Museum of Nature & Science. For these great reasons, we expect high numbers of attendees.

The Annual Meeting. Traditional symposia, themed sessions, demo camps, workshops, and a plenary session are being planned around a theme that reflects the core aim of SPNHC to codify and disseminate best practices for the development, management, and care of natural history collections and their associated data. The annual tradeshow will bring together a host of vendors whose products and technologies help us meet the unique demands of 21st century collections care, access, and use, along with an important industry focus on being green. A variety of fieldtrips highlighting Colorado's unique natural and cultural history will be offered. Collection tours of the Avenir Collections Center will be a highlight. Exciting social events will culminate in a gala celebration!

Schedule. Monday, 6/12, the first day your materials may arrive at the Curtis; Tuesday, 6/20, set up; Wednesday, 6/21, exhibit hall opens with coffee breaks and a cocktail reception at the end of the day in the hall; Thursday, 6/22, exhibit hall is open with coffee breaks in the hall; Friday, 6/23, take down.

Last updated: March 2016

Sponsorship & Tradeshow Participation
Society for the Preservation of Natural History Collections
2017 Annual Meeting

SPONSORSHIP CATEGORIES:

CATEGORY	SUPPORT LEVEL†	EXAMPLE OF FUNDED EVENT	BENEFITS‡
Diamond Partner	$10,000	2017 Annual Meeting	●Elite Partner of the 2017 Meeting ●Four paid meeting registrants and four tickets to banquet ●Logo printed on conference merchandise to be received by all participants ●Logo prominently displayed on the conference website Homepage ●Recognition in registration material and on conference website Partner Page ●Slide recognition listing between presentations/sessions ●Select location for full page advertisement in Abstracts/Program book ●Top Tradeshow table location ●Your marketing materials included in participant welcome packet ●List of participants (with contact information)
Platinum Partner	$ 5,000	Plenary Session Ice Breaker Reception Vendor Cocktail Reception Banquet Gala	●Lead Partner of the 2017 Meeting ●Two paid meeting registrants and two tickets to the banquet ●Logo printed on conference merchandise to be received by all participants ●Logo prominently displayed on the conference website Homepage ●Recognition in registration material and on conference website Partner Page ●Slide recognition listing between presentations/sessions ●Premium location for 1/2 page advertisement in Abstracts/Program book ●Premium Tradeshow table location ● Your marketing materials included in participant welcome packet ●List of participants (with contact information)
Gold Partner	$ 2,500	Emerging Professionals Lunch Technical Session Symposium Demo Camp	●Two paid meeting registrants ● Recognition in registration material and on conference website Partner Page ●Slide recognition listing between presentations/sessions ●Preferred location for 1/4 page advertisement in Abstracts/Program book ●Preferred Tradeshow table location ● Your marketing materials included in participant welcome packet ●List of participants (with contact information)
Silver Partner	$ 1,500	Workshop	●One paid meeting registrant ●Recognition in registration material and on conference website Partner Page ●Tradeshow table ● Your marketing materials included in participant welcome packet
Bronze Partner	$ 750	Poster Session	●One paid meeting registrant ● Recognition in registration material and on conference website Partner Page ●Tradeshow table
Supporting Partner	$ 500	Student Registration	●One paid meeting registrant or sponsorship of a Student Registration ●Recognition in registration material and on conference website Partner Page

†All Amounts are in US Dollars

‡Where applicable, your logo on the Homepage and recognition on the Partner Page of the official conference website will appear upon receipt of partnership payment. This is a great opportunity to increase your visibility early. Tradeshow table location is at the sole discretion of the Local Organizing Committee.

How do I become a Sponsor? Please email the contact below to ask questions and to get instructions for registering as a Sponsoring Partner.

Last updated: March 2016

Contact.   Kelly Tomajko, SPNHC 2017 Local Organizing Committee Chair
Denver Museum of Nature & Science
2001 Colorado Boulevard
Denver, CO 80205
W 303-370-6401
SPNHC2017@dmns.org
www.spnhc2017denver.org

Sample - INSTRUCTIONS FOR PRINT ADS

Program Advertisements
Society for the Preservation of Natural History Collections
2017 Annual Meeting

General advertisement locations-

      2 page spread black and white $700

      1 page black and white $500

      ½ page black and white $300

      ¼ page black and white $200

Suggestions for program advertisements and submissions-

- Full page, 6 ½" x 9"; half page, 6 ½" x 4 ½"; one quarter page, 3 ¼" x 4 ½"
  - Ads should be submitted in jpeg, pdf, or tiff format, by Email to: SPNHC2017@dmns.org
  - **All ads subject to approval/placement by publisher/SPNHC 2017.**

Last updated: March 2016

Sample - SPONSORSHIP AGREEMENT

Society for the Preservation of Natural History Collections
Annual Meeting, June 18-24, 2017
Denver, Colorado

**Sponsorship & Tradeshow
Agreement**

This document serves as an Agreement between the Society for the Preservation of National History Collections (SPNHC), through its duly authorized representative Kelly Tomajko, Local Organizing Committee Chair, of the Denver Museum of Nature & Science ("Organizers") and _____(hereafter "Sponsor") for the 2017 SPNHC Annual Meeting to be held June 18-24, 2017 in Denver, Colorado.

The Agreement shall become effective on the date signed below and will remain in effect until all responsibilities set out are fulfilled. The parties acknowledge that they will use their best good faith efforts to negotiate and resolve subsequent issues that may arise from this Agreement as a result of unforeseen occurrences and that may alter the conditions of this Agreement.

a) **Sponsorship & Tradeshow**

The various opportunities and benefits associated with sponsoring the 2017 SPNHC Annual Meeting are defined in the SPNHC 2017 Sponsorship Opportunities document which is incorporated by reference into this Agreement.

b) **Tradeshow: Exhibit Location Assignments**

The assignment of the tradeshow table location is guided first by the Sponsorship level, as defined in the SPNHC 2017 Sponsorship Opportunities document, and then on the order in which executed Terms of Agreement forms are received, together with required payment, by the Local Organizing Committee Chair. The SPNHC Local Organizing Committee will make every effort to place sponsors in their preferred location and is solely responsible for the final determination of table location.

c) **Space Rental**

The tradeshow exhibit space will include one 6' x 30" table with black linen, two chairs, and a wastebasket, and wireless internet access. Additional needs for electricity and AV must be requested by completing a Vendor Order Form and submitting it to the Curtis. Sponsors must provide their own electrical and computer equipment, if required.

Audiovisual equipment must not be played at a sound level that would interfere with adjacent exhibitors.

d) Use of Space and Tradeshow Time

No Sponsor shall permit any other company or its firms or representatives to use the space allotted to the signer of the Agreement, nor shall he/she display articles not manufactured or normally sold by the company or firm signing the Agreement. Requests for co-participation by any other company or firm in space assigned to the original applicant must first be made in writing to the Local Organizing Committee Chair. If permission is granted, there will be an additional charge of $500 for the additional company/firm and $500 for each additional participant/representative, unless the sponsorship level includes sufficient paid meeting registrants. Sponsors may not sublet tradeshow tables or assign this lease in whole or part without the prior consent of the Local Organizing Committee Chair.

The Sponsor agrees to set up its display at the assigned table location on Tuesday, June 20, 2017 between 9:00 am and 5:00 pm. The Sponsor also agrees that all exhibit and personal property shall be removed from the Curtis by Friday, June 23, 2017 at 5:00 pm. Sponsors are responsible for making their own post meeting shipping arrangements.

All demonstrations, sales activities, and distribution of circulars and promotional material must be confined to the limits of the Sponsor's assigned tradeshow location. All equipment for display or demonstration must be placed within the assigned area to attract observers.

Nothing shall be posted or tacked, nailed, screwed, or otherwise attached to the columns, walls, floors, or other parts of the conference spaces.

In the interest of the meeting, the Sponsor agrees not to extend invitations, call meetings, or otherwise encourage absence of members, other sponsors, or invited guests from the technical sessions and symposia or Tradeshow Hall during the official hours of the sessions or tradeshow.

e) Payment and Cancellation

Full payment is required for tradeshow reservations. This agreement is then considered effective, as of the date signed below and shall remain effective until all responsibilities set out are fulfilled.

Cancellations must be made in writing, received, and confirmed by the Local Organizing Committee Chair by March 1, 2017, to qualify for a refund, less a $100 processing fee. No requests for refunds will be processed on

cancellations received after that date. If sponsoring promotional items, once the Agreement is signed and the item is in production, there will be no refunds.

f) Release, Indemnification, Limitation on Damages

Sponsor hereby releases Organizers from any and all claims or liabilities arising out of or related to this Agreement. The Organizers will not be liable for damage or loss to Sponsor's property, nor shall they be liable for any physical injury that may occur during any event or activity in which Sponsor participates as authorized under this Agreement. Sponsor shall indemnify and hold harmless the Organizers (including their agents and representatives) from any and all losses, damages, and claims caused by the Sponsor's negligence or misconduct. Sponsor will also pay the cost of making good any damage to floors, wall structures, and accessories of the Organizers (including their agents or representatives). In no event will Organizers be liable to the Sponsor for any consequential or indirect damages, including without limitation loss of profits.

g) Facsimile or Electronic Execution

This Agreement may be executed by any party by delivery of a facsimile, email of the signed Agreement in portable document format (pdf), or similar electronic image-based format (collectively, "Facsimile") and such Facsimile execution shall have the full force and effect of an original signature.

By signing below, the Sponsor acknowledges that it has read and understands the terms and conditions of this Agreement.

_____   _____
Sponsor Authorized Signature   Date

<u>Sample – CODE OF CONDUCT</u>

<u>**2019 Annual Meeting Code of Conduct**</u>

The 2019 Annual Meeting of the Society for the Preservation of Natural History Collections (SPNHC) will take place in Chicago, Illinois, USA May 26-30, 2019. By registering for the meeting and/or participating in any workshops, panels, or other activities associated with this conference, you agree to the following Code of Conduct:

<u>Authors:</u> Authors of presentations and workshops should conform to the highest standards of scientific attribution and citation in their presentations and other materials submitted. All authors connected to a presentation and associated abstract must be aware of and agree with the information presented. Obtaining consent from all authors to be associated with the presentation is the responsibility of the lead and presenting author(s).
An author who submits an abstract for presentation at this conference must have intention of registering, attending, and presenting at the meeting once the submission is accepted into the program. Authors must abide by any submission deadlines, presentation time limits, or other format-related instructions provided by the meeting's organizers.

All authors must complete a Speaker Release form prior to their presentation, allowing SPNHC to record the presentation for non-commercial educational and outreach purposes.

<u>Harassment and Safety:</u> SPNHC is dedicated to providing a safe, hospitable, and productive environment for everyone attending their events, regardless of ethnicity, national origin, religion, disability, physical appearance, sex, gender expression, or sexual orientation. It is important to remember that a community where people feel uncomfortable or threatened is neither healthy nor productive. Accordingly, SPNHC prohibits intimidating, threatening, or harassing conduct during our conference. This policy applies to speakers, staff, volunteers, and attendees. Conference participants violating these rules may be sanctioned or expelled from the conference, at the discretion of leadership.

Harassment of participants at SPNHC-sponsored events will not be tolerated in any form. Harassment includes offensive gestures or verbal comments related to ethnicity, national origin, religion, disability, physical appearance, sex, gender expression, or sexual orientation in public spaces, deliberate intimidation, stalking, following, harassing photography or recording, sustained disruption of talks or other events, inappropriate physical contact, and unwelcome attention. Participants asked to stop any harassing behavior are expected to comply immediately.

If a participant or exhibitor engages in harassing behavior, conference leaders may take any action they deem appropriate, ranging from a simple warning to expulsion from this and future conferences. If you are being harassed, need to file a complaint, or have other concerns about the safety of participants, please do not hesitate to contact one of the conference organizers who will work with you to resolve the situation.

We will help participants contact venue or hotel security or local law enforcement, and otherwise assist those experiencing harassment, to enable them to feel safe for the duration of the

conference. We value your attendance, and want to make your experience as productive and professionally stimulating as possible.

Photography and Image Release: Participants may not take photographs or videos that may be disruptive to presenters (flash; shutter sounds; distracting presence) during sessions.
The nature and mission of SPNHC's activities is to reach as broad an audience as possible. To this end, not only are abstracts published, but presentations (audio/video, slides, and posters) themselves and conference events may be photographed, streamed, recorded, and made publically available. Both SPNHC and the Field Museum of Natural History (the 2019 Annual Meeting's host) reserve the right to use photographs and videos taken and testimonials given during any conference event or in subsequent meeting surveys for educational, reporting, promotional, advertising, and fundraising purposes; you agree that SPNHC and the Field Museum may use your name, voice, and likeness as captured in such recording for these purposes.

Personal Data: During the registration process and conference, SPNHC may need to collect personally identifiable information from you. SPNHC will use your personal data only for the purposes of conference registration, organization, and communication with conference organizers. SPNHC may also contact you about future meetings or community events that may be of interest to you; you can opt out of these communications at any time. SPNHC will share your personal data with third parties only to the extent necessary for such third parties to carry out the above purposes on SPNHC's behalf.