

# Event Planning Timelines

...in a perfect world.

Lyndsay Smith, Meeting & Program Planner ~ [LSmith@TexasBar.com](mailto:LSmith@TexasBar.com) ~ (512) 427-1419



# Booking an Event

CLE Course or Council Retreat



# 6-12 Months Out

(But not less than  
6 months out!)

## BOOK YOUR MEETINGS FOR THE YEAR

- Flexibility is key: 3 locations and 3 dates.
- Think seasonally – avoid sports home games, religious holidays, the first day of deer season...
- Total meeting cost is more than just the room rate: food & beverage, audio/visual, travel, rental cars, parking...
- 3 months out will severely handicap you.
- We will bid multiple properties.



# **Council Meeting or Retreat Timeline**

# 3 Months Out

## FINAL SELECTIONS & DEADLINES

- Download and use the Council Retreat Deadline Tracker (in today's course materials).
- Council starts booking hotel reservations – it is better to make an early reservation and cancel, than to make a late reservation.

# 6-8 Weeks Out

## FINAL SELECTIONS & DEADLINES

- Confirm AV Orders.
- Make food & beverage menu selections  
– set quantities low and finalize 2 weeks before.  
You can increase, but you can never go down!
- Book any offsite restaurants.
- Remind Council to make their hotel reservations before the cut-off date.
- Circulate initial agenda.



# CLE Course Timeline

# What we handle

## THERE ARE LIMITS TO WHAT WE HANDLE

- We handle smaller CLEs:
  - 1/2 day to 1 1/2 days
  - Approximately 150 registrants or less
- We can help with advertising for bigger events.
- We can *try* to staff...



# 4-7 Months Out

## PLAN PROGRAM

- Download and use the CLE Deadline Tracker (in today's course materials).
- Have a planning meeting.
  - Set pricing, select topics and invite speakers
- Send out a 'Mark Your Calendar' eblast with bulleted topics.
- Create agenda/brochure and start confirming your program. \*Send a properly formatted agenda/brochure...

# Properly Formatted Agenda

## YOURS SHOULD INCLUDE...

- Start time / End time
- Topic Title
- Speaker name
- Speaker city
- Title if any
- Affiliation

1:00	<b>Preservation of Error in CPS Cases</b> .5 hr. Michael Hull, <i>Houston</i> Harris County Attorney's Office
1:30	<b>Mock Trial Presentation: How to Keep from Losing Your Appeal During Trial</b> .75 hr. Hon. John Delaney, <i>Bryan/College Station</i> Senior Judge, Child Protection Court
	Charles Griffin, <i>Austin</i> Department of Family and Protective Services
	Karen J. Langsley, <i>Denver</i> Langsley Law
2:15	<b>Top 10 Appellate Tips for Trial and Appellate Advocates</b> .5 hr. Hon. Gina M. Benavides, <i>Corpus Christi</i> Justice, 13 <sup>th</sup> Court of Appeals
2:45	<b>Filing the Petition for Review</b> .5 hr. Blake Hawthorne, <i>Austin</i> Clerk, Supreme Court of Texas
3:15	Break

# 3-4 Months Out

## CONFIRM PROGRAM AND DETAILS

- Program confirmed.
  - Send full eblast with live online registration and hotel reservation links.
- Notify speakers of deadlines and details: hotel reservations, dinners, course materials due.
- Build in deadlines for advertising...

**3**  
**Months Out**

## **YOUR ADVERTISING SHOULD LAND NOW!**

- Approximately 5 weeks to get a printed brochure to someone's desk.
- Approximately 1 week for us to do an electronic brochure, shopping cart, and e-blast.
- **Build these time frames into your schedule!**

# 6-8 Weeks Out

## FINAL SELECTIONS & DEADLINES

- Last chance to book hotel reservations
  - watch for attrition fees!
- Request and approve MCLE credit.
- Confirm AV Orders.
- Make initial food & beverage menu selections
  - set low and if needed, increase right before event.
- Presenter course materials and bios are due.
- Book any offsite restaurants.

# Words of Caution!

## CAN I HAVE A DO-OVER?

- Remember – SBOT signs the contracts!
- Your room rate should be \$220 max.
- Lots of time and money is often on the line.
- Rushed advertising causes mistakes.
- The later you are, the less people will be there.
- We need prompt written/emailed approval on bills.