
Event Planning Timelines

Meetings, Webinars & CLEs

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WHO PLANS WHAT NOW?

▶ The Section

- ▶ You can plan your own events. You can find your own venues. You can negotiate your own contracts and send them to the Bar for signature. You can pay your own bills and seek reimbursement. You can do all of it on your own or with a hired 3rd party vendor.

▶ TexasBarCLE

- ▶ You can let TBCLE host or co-host your CLE, but it is then their event. Virginia will talk in more detail about this option after me.

▶ Sections Department

- ▶ We can plan all or part of your event. Just tell us what you want us to manage vs what you want to handle yourself. This presentation details what the Sections Dept. planning your event from start to finish looks like...

THE SECTIONS DEPARTMENT IS AT WORK FOR YOU!

- ▶ In-Person Council Meetings (and any associated receptions/dinners)
 - ▶ You pick 2 cities and 3 dates, we bid the venues and negotiate contracts for you!
- ▶ Council Meetings via Zoom
- ▶ In-Person CLEs (and any associated receptions/dinners)
 - ▶ ½ day - 2 day CLEs with under 200 attendees.
- ▶ CLE Webinars via Zoom
 - ▶ Each section gets a single 1-hour webinar per month.

Want to host your own Zoom? We can help walk you through how to setup your own account, educate you on Zoom 101, security settings, and more!

IN-PERSON COUNCIL MEETING PLANNING TIMELINES

12-6 Months:

- ▶ Bid dates and venues.
 - ▶ Select date and venue (have State Bar sign the contract).
 - ▶ Let council know - Email hotel reservation link.
-

3 Months:

- ▶ Make any offsite dinner reservations.
 - ▶ Remind council to make travel arrangements.
-

1 Month:

- ▶ Confirm AV orders.
 - ▶ Confirm F&B menu selections & final head count.
 - ▶ Get RSVPs for dinner.
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1 Week:

- ▶ Meeting materials are due and posted online.
- ▶ Email final agenda and itinerary, including Zoom info for anyone attending digitally.

ZOOM COUNCIL MEETING PLANNING TIMELINES

3-6 Months:

- ▶ Set the date.
 - ▶ Send a “Save the Date” email.
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4-6 Weeks:

- ▶ Create and share the Zoom link.
 - ▶ Set due date for/request applicable meeting materials from your council.
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1 Week:

- ▶ Share the agenda with your council.
- ▶ Send the Zoom link again.
- ▶ Post meeting materials online/share materials with your council.

IN-PERSON CLE PLANNING TIMELINES

12-6 Months:

- ▶ Bid dates and venues.
 - ▶ Select date and venue.
 - ▶ Have a planning meeting -- start confirming your program.
 - ▶ Send a 'save the date' eblast.
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4 Months:

- ▶ Make any offsite dinner reservations.
 - ▶ Remind council & speakers to make travel arrangements.
 - ▶ Set pricing -- registration/shopping cart created.
 - ▶ Send us the brochure so we can add cart info and eblast membership.
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1 Month:

- ▶ Hotel reservation block typically closes at this time.
 - ▶ Get MCLE course number and credit.
 - ▶ Confirm AV orders and F&B menu selections.
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1 Week:

- ▶ Course materials are due and posted online.
- ▶ Send reminder/last chance eblast.

CLE WEBINAR PLANNING TIMELINES

3 Months to 3 Weeks:

- ▶ Select CLE date, including start and end times.
- ▶ Select topic title and write a brief description (2-3 sentences).
- ▶ Select speaker and confirm their email.
- ▶ Calculate desired MCLE hours, including if there are any ethics.
- ▶ Set pricing (if any).
- ▶ Set AV dress rehearsal date with speakers.

If you send those 6 bits of info, the Sections Dept. will do the rest! Or if you're hosting on your own you will also need to...

- ▶ Request MCLE Course Number (\$50 late fee if you're less than 15 days out).
- ▶ Create Zoom link.
- ▶ Eblast/advertise to your members.

1 Week:

- ▶ Post course materials online/share with attendees.
- ▶ Have AV dress rehearsal with speakers.

FINAL TIPS TO BOOK LIKE A PRO

- ▶ Flexibility is key.
 - ▶ Provide multiple dates, that your council can attend. Have 2 different cities in mind. Can you change up your meeting path?
- ▶ Choose your room block carefully -- attrition is expensive!
 - ▶ Book too small and risk losing attendees. Book too large and risk attrition.
- ▶ Think seasonally and be aware of city events.
 - ▶ Avoid religious holidays, college football home games, annual festivals, the 1st day of deer season...
- ▶ PLAN AHEAD!
 - ▶ Trying to book something in 3 months or less will severely limit your options and our ability to negotiate.

I adore spontaneity, providing
it is carefully planned.



How many meeting planners
does it take to fix a...

...DONE!



Sorry your party
is just a meeting
with food.



Thank you!