

# CARL Interest Group Program Planning Manual

## Part I. OVERVIEW

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Communication with other CARL program planners and officers is essential to the organization's effective coordination and continuity. This overview will help you to communicate and plan effectively.

### BEFORE

Advance planning is a prerequisite of a successful event. Allow a minimum of three months, although four to six is strongly recommended, to plan for reservations, publicity, etc. CARL elections are conducted in early fall to provide time for incoming officers to plan their early spring programs.

For seed money, informally clear the amount needed with the Regional Vice President before filling out the **Financial Request Form** (Appendix D). The maximum amount that may be requested in advance is \$300. Send a copy of the completed form to the Treasurer. See "Guidelines for CARL Interest Group Reimbursement."

Refer to **CARL Program Planning Checklist** (Appendix A) for a quick list of program essentials. With your committee, fill out the **CARL Program Planning Preliminary Worksheet** (Appendix B) as a discussion document. Contact the CARL President, who keeps the CARL Master Calendars for approval of the date selected for your program. The President will be coordinating all programs and resolving any conflicts. The President will forward all information for the Master Calendars to the CARL Web Manager for posting to the **CARL Events Calendar**. Two or three months in advance of the event, you should send a News Release to appropriate organizations and post announcements to appropriate email reflectors and listservs, for example CARLALL, and the CARL Website.

Send news releases and/or program announcements to the Regional Campus Liaison Coordinator. This person will distribute the announcements to individual campus liaisons who in turn will distribute them to the CARL members within their institutions.

Send your program announcement to the CARL Newsletter editor for distribution to all CARL members. If the next issue of the *Newsletter* will not be timely enough for your program, request mailing labels from the Membership Chair, in zip code order (use Mailing Labels Request Form) and mail program announcement. Allow two to three weeks for delivery. At a minimum, announcement of CARL programs should be sent to all CARL members in the region where the event will occur. If materials are to be sent via traditional postal service, please be aware of and consider the postage costs. Use your institution's services, if at all possible. If room reservations and/or food services are involved, be sure to leave adequate time for program attendees to receive and return mailings. Make up a list of program attendees with their institutional affiliations as

registrations are received, and send the list to the CARL Membership Chair. The CARL Board is interested in the attendees and affiliations for membership purposes. These lists are also valuable for your own information, for instance, to identify people who will be paying at the door. If preregistration is not required, the list of attendees should be prepared and mailed to the Membership Chair after the event. Please provide nametags or badges for all program attendees and cover this expense in your financial report.

Create an evaluation form for your program. You may want to distribute your evaluation form at the registration table or at the conclusion of your program. Be sure to share the summary of this evaluation with your Regional Vice President and Regional Interest Group Coordinator.

## **AFTER**

Fill out the CARL **Financial Report/Request Form** and the **Program Summary Form**, and send them to the Treasurer.

Send copies of the program summary to the CARL Newsletter Editor, the Web Manager, the Regional Vice-Presidents and IG Coordinators, and to the ACRL Chapters Council delegate, for submission to *Chapter Topics*. (See "Publicity").

Please write thank you letters to your speakers and to members involved in local arrangements.

If your program is taped, send tapes of the program to the CARL Archivist. (Be sure to have asked your speaker(s)' permission before you tape.)

## **Part II. PUBLICITY**

### **News Releases**

A news release should be prepared to announce your program and all pertinent information concerning it. This announcement essentially collects the information, which will appear on your flyer, catches the public's eye, and provides enough information for the prospective attendee to make inquiries or to register.

At a minimum, a news release should be sent out two to three months before the program. In most cases, it may be distributed by posting to an email reflector or listserv. See Appendix E for the list of reflectors, listservs and organizations to which you might send this mailing.

### **Program Announcement/Flyer**

Include everything in easy-to-read layout: sponsor, content, speakers, date, time, place, prices/membership information, deadline, further information, or contact person with a phone number, and registration form. If you can afford it, a graphics service will print

this information in a clear layout. Consider mailing the announcement first class in envelopes.

**WHO:** CARL (California Academic and Research Libraries) should appear as the heading on all correspondence with the Interest Group name, if applicable. This also applies to co-sponsored events. You can request a copy of the official CARL logo from the secretary or just cut and paste from the website.

**WHAT:** Title of program, description, speakers and their affiliation and/or qualifications.

**WHEN:** Date and time, schedule of events.

**WHERE:** Place, with directions telling how to get there, and/or a map. Include parking instructions.

**HOW MUCH:** CARL members pay a lower price than other attendees. For example, non-members may pay \$15 for a program, while CARL members pay \$10- \$12. Library students may be invited at an even lower cost.

**OTHER:** Statement concerning advance registration required, deadline date, no refunds offered after a given date, no refunds for no-shows, etc. This section is to protect you and save time and future grief.

**REGISTRATION FORM:** Name and institution, address, phone number, amount enclosed and for what purpose (program, program and membership, program and meal, etc). Statement to make check payable to CARL. Canceled check; is your receipt; and some specific information such as their choice of meal (meat, fish, vegetarian, etc.).

### **Part III. PROGRAM SUMMARIES**

A program summary is a good means of disseminating the information presented at the program to a wider audience. Summaries are usually published in the *CARL Newsletter*, and may now also be made available through the CARL Web Site. A well-written summary reflects positively on the speakers and the sponsor and may serve to interest readers in future programs. This task should be given high priority.

Responsibility for writing the summary should be assigned before the program and the summary should be prepared and submitted within one or two weeks of the program. Cover the salient points made by the speakers, plus references to handouts and audiovisuals used. The summary should be edited and proofread, and then sent by email to the *CARL Newsletter* Editor and the CARL Web Manager, with copies to the Regional Interest Group Coordinators (for IG programs), the Regional Vice-Presidents and the ACRL Chapters Council delegate, for representation in the articles submitted to the *Chapters Council Newsletter*.

The length of the summary should be appropriate to the presentations. As a guideline, two to five typewritten, double-spaced pages (400-800 words, or a half-page to a full page in the *Newsletter*), is the normal range, but shorter or longer summaries are acceptable. Since a summary of any length is acceptable for the Web Site, you may wish to submit a longer one for that platform, and a shorter one for the *Newsletter*.

See recent issues of the *Newsletter* for examples of summaries and for information about submitting items. Deadlines are posted in each issue and strictly observed. The normal practice is to submit texts by email. If this is not practical, and you have the file in electronic form, it is better to mail a diskette instead of printing out the text and mailing it, so that the Newsletter Editor or Web Manager need not retype the text. (See Appendix F)

#### **Part IV. FINANCIAL PLANNING**

Estimate funds needed to cover the full expenses of your program, assuming three-quarters of your expected attendance. For planning purposes, assume that all attendees will be CARL members. In reality, some attendees will undoubtedly pay the higher non-member rate to attend the program.

Be sure to include such costs as travel reimbursement and meals for your speaker(s), an honorarium if applicable (see Appendix E), room and A/V rental costs, food prices if any, mailing labels, duplication and postage, name tags, cassettes if program is to be taped, etc.

If you are likely to incur out-of-pocket expenses before the program, e.g., for room reservation deposits, duplication of program announcements, postage, or name tags, complete a Financial Report/Request Form (Appendix D1) and send it to the Treasurer. The maximum seed money advance is \$300 per IG program.

Set the cost of program registration and meal service, if any, to cover your full costs (plus, ideally, to make some extra to support CARL's overall budget). The cost for CARL members should cover all expenses, assuming three-quarters of your expected attendance. The cost for non-members should normally be \$5 - \$10 more.

Keep accurate records of both your estimates and actual costs. This will help in planning future programs and will also enable you to complete a full financial report on your program for the CARL Treasurer.

Questions regarding financial planning should be directed to your Regional Vice President.

#### **Part V. FINANCIAL REPORTING**

List the name of each person who has issued a check to CARL or the persons for whom checks have been issued by institution or persons. If an institution or person pays for several persons, indicate each person's name. If cash is submitted, substitute your own

personal check for the cash.

Itemize separate amounts, as well as total amount of the check, e.g., Libby Librarian paid \$20 (\$10 - luncheon, \$10 - ACRL only membership dues). Include date money/checks were received. Indicate total amount enclosed in the envelope sent to the Treasurer, i.e., 10 luncheons @ \$10 = \$100

3 ACRL-only membership dues @ \$10 = \$ 30

1 non-ACRL member dues @ \$15 = \$ 15

TOTAL enclosed = \$145

Provide complete information about program expenses on the Program Financial Summary form.

Submit all forms promptly to the Treasurer, within two weeks after the program if possible. Indicate any time requirements as well as names and addresses for payment of bills to individuals or institutions. If an event is postponed or canceled, send a brief statement of revenues and expenses.

Indicate the various revenue and disbursement categories, such as specific membership dues, printing, mailing labels, luncheon/dinner meeting, programs, postage, office expenses, donations, travel, etc. This will make the budget useful as a planning and operating tool.

When an event /meeting/meal/program is co-sponsored with one or more organizations, indicate to the Treasurer the extent of CARL sponsorship, to which organizations the check/registrations are payable, and level or percentage of revenue and/or profit CARL will be allocated which has been agreed upon in advance. All arrangements for program co-sponsorship must have the prior approval of the appropriate regional Vice President.

## **Part VI. SPEAKER COMMITMENTS**

This section lists topics useful for you to include in your oral and written communication with your speaker(s).

Reiterate the date, time, sponsor, location, program title, etc. in your letter as a frame of reference for the speaker.

Ask for the presentation paper, or, at a minimum, an outline of the paper by a set date, for instance, two weeks in advance of the program. This will cut down the chances of an ill-prepared speaker or a rush job. Also, in the case of multiple speakers, this will allow for an exchange of papers, which will help eliminate the chance for duplication of the material to be presented.

Ask for the speaker(s) to send his/her biographical material to you or to the program's moderator. Set a date for receipt several days in advance of your program.

Specify the amount of time allowed for the talk. Monitor the time at the program.

Note the sequence of speakers.

State your expectations of the speaker: casual remarks, research paper, state of the art, reaction to main address, etc.

Describe the room size, level of the audience, and number of people expected. The speaker will need this information as they prepare their presentation. Usually the speaker pays for and brings any handouts. Be sure to clarify this early as a large copying bill could seriously affect your budgeting.

Ask about audiovisual equipment needed.

Discuss the honorarium, if any, the method for handling travel, transportation, meals and lodging expenses, and when the speaker will be reimbursed. The Vice President in your region must approve speaker reimbursements for travel, lodging, etc., and the amount of honorarium (see Appendix E).

If you plan to record the program, ask permission to tape the speech and give the purpose for the taping (archival, recording to help in summarizing the talk for newsletters, etc.).

## CARL Program Planning Manual - Appendix A

# CARL PROGRAM PLANNING CHECKLIST

### Before:

- ❑ Plan to attend the first CARL Regional Leadership meeting of the year for important orientation; be sure you have the most recent edition of CARL Program Planning Manual (CPPM).
- ❑ Allow 3-6 months to plan a program (ideally).
- ❑ Meet with Interest Group and decide on a program.
- ❑ Decide program specifics (topic, date, speakers, location, time, meals, refreshments, etc.). Read introductory text of the CARL Program Planning Manual and detailed worksheets in Appendix B for a fuller explanation. Contact possible speaker(s).
- ❑ As soon as you decide on a tentative date for program, contact CARL President for confirmation of date and for inclusion into Master Program Calendar. When date is approved, notify Regional Vice-President and Regional IG Coordinator as soon as possible.
- ❑ Request seed money, if appropriate. See Financial Request Form (Appendix D).
- ❑ Send confirmation letters to speakers. If you plan on giving speakers honoraria, send Financial Request Form to CARL Treasurer. Allow 3 weeks for delivery of check. (See Appendix K for CARL policy regarding speaker reimbursement).
- ❑ Send news item about program or program announcements to Regional Campus Liaison Coordinator and Newsletter Editor as soon as possible after date is set. (Newsletter deadlines are February 15, May 15, August 15 and November 15.)
- ❑ Request mailing labels for program announcements about 7-8 weeks in advance of program, from Membership Chair. Allow 2-3 weeks for delivery. (See Appendix C for Mailing Label/List Request form).
- ❑ Mail program announcements about 3-4 weeks in advance of program if sending first class mail (six weeks if sending bulk mail). Allow 2-3 months if sending publicity to national journals. (See Publicity in Introductory text, Appendix B, p. 4 and Appendix E. 1 for more information about flyers). Send copies to CARL President, Regional Vice-President, Regional Campus Liaison Coordinator, Regional IG Coordinator and CARL Archivist.
- ❑ Prepare a program evaluation form.
- ❑ Appoint or assign a volunteer to take program notes and write up a program summary.

### After:

- ❑ Prepare a program financial report and send to CARL Treasurer and Regional Interest Group Coordinator. Include the number of attendees who are CARL and non-CARL members.
- ❑ Send program summary to CARL Newsletter Editor (see Appendix E).

- ❑ Send thank you letters to speakers and IG members involved with local arrangements.
- ❑ Send a preliminary annual report (can be informal) to Regional Interest Group Coordinator before the final Executive Board meeting of the year, if appropriate. Reports are the basis for Regional Interest Group Coordinator's report at the final Executive Board meeting.
- ❑ After the last program is held, prepare an annual report, including names of new officers (if known), and send to CARL President and Regional Interest Group Coordinator by Dec. 15th.
- ❑ The outgoing Interest Group Chair should send Roster of new (calendar) year's Interest Group Officers to CARL President by Jan. 5th.
- ❑ Self-evaluation / debriefing by Interest Group.

Prepared by Mari Miller, 1992 Interest Group Coordinator, 1/93 ; revised by Suellen Cox and Fred Batt, 8/2003

## **CARL Program Planning Manual, Appendix B1**

### **Preliminary Worksheet**

The purpose of this sheet is to help your committee crystallize an initial idea into a working plan.

**IDEA OR TITLE OF PROGRAM:**

**WHY DO YOU THINK THIS IDEA IS RELEVANT, TOPICAL AND/OR ATTRACTIVE FOR ACADEMIC AND RESEARCH LIBRARIANS AND OTHERS WITH AN INTEREST IN ACADEMIC LIBRARIES?**

**TARGET AUDIENCE** (for all academic librarians and other staff, for those in mid-level management positions, those in science reference, those in community colleges, etc? ):

**LEVEL OF PROGRAM** (introductory, suitable for those with some experience in area, for those with substantial subject knowledge and/or experience with topic, etc.)

**TYPE OF PROGRAM** (dinner, all day, seminar, workshop, panel, etc):

**DAY AND DATE PLANNED** (1st, 2nd and 3d choices):

**HOURS** (inclusive):

**SPEAKER(S):** (Have you made tentative inquiries about their capability, availability, willingness to speak, and fee, if any? ):

**LOCATION OF EVENT** (preliminary inquiries and tentative reservations for the dates you selected?):

**FACILITIES** (Auditorium, restaurant, conference meeting rooms?):

**MEAL(S) AVAILABLE** (vegetarian also?):

**DRINKS AVAILABLE:**

**A-V EQUIPMENT NEEDED** (tape recorder, microphones, over-heads, screen, computer, LCD projectors, internet access):

**SIZE OF GROUP YOU EXPECT** (or upper limit facilities can hold):

**INDIVIDUALS WHO WOULD HELP YOU PLAN** (should be CARL members):

**ESTIMATED COSTS** (Speaker, advanced room deposit, meals, coffee, donuts, equipment rental, postage, duplication of announcements, envelopes, labels, name tags, etc.):

## CARL Program Planning Manual, Appendix B2

### Detailed Planning Worksheet

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**This check-off sheet will help you remember most of the details, which need to be considered in planning for a smoothly run program.**

#### A. PLANNING

- \_\_\_\_\_ HOTEL ACCOMMODATIONS. You need to reserve overnight accommodations well in advance for your speakers.
- \_\_\_\_\_ PUBLICITY. News releases should go to the CARL Newsletter. If time permits, releases may be sent to professional journals such as American Libraries or Library Journal. Addresses for these publications appear in Appendix E. Be sure to allow two to three months advance notice when sending publicity to national publications. (See also FLYERS)
- \_\_\_\_\_ CONTACT PERSON. Be sure to identify the liaison with the hotel, library, restaurant, etc. and know who will be there for your event.
- \_\_\_\_\_ DEPOSITS. Required in advance, usually, for rooms, meals etc.
- \_\_\_\_\_ SEED MONEY. Request on form in Appendix E. Maximum is \$300.
- \_\_\_\_\_ HANDOUTS. Provide written materials to attendees i.e., bibliographies, speakers' handouts, etc., when they enhance the program.
- \_\_\_\_\_ BREAKS. Coffee tea, soda water, juice, etc. Be sure to plan for breaks. You might not need one, but your audience will.
- \_\_\_\_\_ MEALS. Offer a vegetarian choice, if possible. Note day final count is due. Be sure to ask what additional fees are tacked on to the stated menu price (tax and gratuity--overall a minimum 21% extra charge, usually). Indicate whether you want a buffet or a served meal. If desired, ask if there is an option of two main courses, e.g., fish and beef, in addition to vegetarian.
- \_\_\_\_\_ SPEAKER. Be sure to confirm the time/place of meeting and any agreed upon expenses, e.g., honorarium, travel reimbursements, in writing, usually at least two weeks before the program. Identify your speaker to your contact at the restaurant, or hotel, etc. so the speaker is served first.
- \_\_\_\_\_ TRANSPORTATION. Plan who will pick up and deliver the speaker to and from the airport, hotel, conference, etc. site.
- \_\_\_\_\_ TAPE/CASSETTE RECORDERS. CARL collects cassette tapes of the programs. Tapes are also helpful for you to have as you write summaries of the program. Inquire whether recorders are available. If so, there are usually extra charges. Tapes can often be supplied for a price, but it is less expensive to bring your own. You need to get the permission of the speaker to tape him/her. It is a nice touch to give the speaker a copy of his/her talk. Send a copy of the tape to the CARL Archivist.

## B. MAILING

- \_\_\_\_\_ ENVELOPES. Consider whether or not you need to mail out flyers for the event.
- \_\_\_\_\_ POSTAGE. Some institutions are willing to support CARL by covering mailing costs; use such help, if it is available.
- \_\_\_\_\_ FLYERS. (See also PUBLICITY). Should be mailed four to five weeks in advance of the event. Have a cut-off date: have map and/or directions, a CARL person to contact for more information, staggered costs for CARL members and non-members option to join CARL, etc. Try for attractiveness, simplicity and clarity
- \_\_\_\_\_ PARKING. Indicate on the flyer whether parking is available. If there is a pay lot, inquire into the hotel's policy on validation, and, if one, state it on the flyer.
- \_\_\_\_\_ MAPS. Often the hotel or institution has maps, which can be transferred to your flyer.

## C. PROGRAM SET-UP

- \_\_\_\_\_ HEAD TABLE. Decide whether to have one or not. Note the number to seat at it and their placement: raised dais or not; microphones or not, etc. Have the speaker **served first; identify him/her to the restaurant, etc.**
- \_\_\_\_\_ PODIUM. Free standing or portable. Should be discussed in conjunction with the placement of the microphone and taping equipment, laptop, etc.
- \_\_\_\_\_ MICROPHONES. Note number needed and their placement (aisle, head table, podium, etc.).
- \_\_\_\_\_ AV. Microphones, slide projector, overhead projector, computer, LCD projector, internet access, screen, extra bulbs, extra extension cords, etc.
- \_\_\_\_\_ BLACKBOARD/WHITEBOARD. Be certain erasers, chalk, and pens are also available.
- \_\_\_\_\_ SEATING. Classroom, theatre, dinner tables, etc. Ask for choices.
- \_\_\_\_\_ TABLES. For meetings with a meal, rounds of 8 are nice; rounds of 10 are too large for table conversations, but are expedient for large groups. Six foot or eight foot long tables are also possibilities. For some programs, determine if chairs alone or chairs at table are best.
- \_\_\_\_\_ SECURITY. Ask what security is available if you plan to have you group leave the room for a period of time (to visit exhibits, to eat in another room, etc.).
- \_\_\_\_\_ WATER. For speakers, dinner table, tables in back of the room for large programs, etc. Do not assume the host hotel or institution will provide water unasked.
- \_\_\_\_\_ FLOWERS OR OTHER TABLE DECORATIONS. If desired, keep them simple and include them in your budget.

- \_\_\_\_\_ REGISTRATION TABLES. Request one or two with tablecloths, be placed at the entrance to the room. Use for displaying nametags, check-off sheet for attendees, payment at the door, CARL membership applications, program evaluation forms, etc. Have one or more of you committee members on duty.
- \_\_\_\_\_ MEMBERSHIP FORMS. Have CARL brochures available on registration table for new CARL memberships or renewals.
- \_\_\_\_\_ NAME TAGS. Have them prepared in advance to add polish to an event. Use large lettering and include institution. Coordinate tag with menu selected, if choices (red dot for beef, green for vegetarian etc.).
- \_\_\_\_\_ RECEIPT BOOK. Have one for individuals paying at the door.
- \_\_\_\_\_ SIGNS. You need to provide directional signs to parking lots, or to the correct conference room. Often the hotel or institution lists the event in its lobby, but additional directions are appreciated by the attendees.

#### **D. FOLLOW-UP**

- \_\_\_\_\_ ATTENDEES. Prepare a list of attendees and their affiliations for the CARL Membership Chair.
- \_\_\_\_\_ PROGRAM SUMMARY.  
Assign responsibility for preparing a summary.
- \_\_\_\_\_ Prepare and submit summary to the CARL Newsletter (see "Publicity")
- \_\_\_\_\_ Assign responsibility for accessing evaluation forms.
- \_\_\_\_\_ ASSESS EVALUATION FORMS

YOUR NOTES AND COMMENTS (Send them to the Vice-President in your region so these sheets can be improved, please).

## CARL Program Planning Manual, Appendix C

### California Academic & Research Libraries

## REQUEST FOR MAILING LABELS

## OR MEMBERSHIP LISTS

There are two ways to send this form to the CARL Membership Director:

### **E-mail**

1. Use your WWW browser's "Send" function to e-mail the form to yourself.
2. Fill it in and forward it to the Membership Director's e-mail address.

### **U. S. Mail**

1. Print out the form.
2. Send the completed paper copy via U. S. mail to the Membership Director's mailing address.

CARL provides printouts from its mailing list for association activities. At the discretion of the Membership Director, mailing labels may be provided to related organizations at cost (but not for advertising or recruitment purposes).

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### **Format [Select one]**

- Mailing Labels (dimensions: 1" x 2-5/8")
- Printed list
- List sent via e-mail

### **Information to include**

- Name and Address
- Name/Address/Phone/E-mail
- Full member record
- Membership forms
- Other: (Please describe)

### **Sorting Order [Select one]**

- Last name
- Zip code
- Institution
- Other: (Please describe)

### **Region (if applicable) [Select one]**

- North only
- South only

### **Interest Groups (if applicable)**

- ABLE
- CALM
- CARLDIG
- CCIG
- CDIG

- \_\_\_ CSUL
- \_\_\_ DIAL
- \_\_\_ GIPIG
- \_\_\_ CARLIT
- \_\_\_ SCIL
- \_\_\_ SEAL
- \_\_\_ TSIG

**Other Groups (if applicable)**

- \_\_\_ Campus liaisons
- \_\_\_ Executive Board members
- \_\_\_ Interest Group officers
- \_\_\_ Volunteers
- \_\_\_ Other: (Please describe)

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Request date: \_\_\_\_\_ Date Needed: \_\_\_\_\_ (Allow 2 weeks for delivery)

Requestor: \_\_\_\_\_

E-mail: \_\_\_\_\_

Phone: \_\_\_\_\_

Purpose for which product is being requested:

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Name and Address to which product should be sent:

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**CARL Program Planning Manual, Appendix D1**

**Deposits, Reimbursements, Advances**

<b>DATE:</b>	
<b>EVENT:</b>	

Name of Requestor:		Phone:		Email:	
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**TOTAL DEPOSIT AMOUNT:** \$ \_\_\_\_\_

Itemization (Registration fees, other receipts)	Number		Amount each		Total Amount
		@		=	
		@		=	
		@		=	
		@		=	
		@		=	
		@		=	
		@		=	

**TOTAL REIMBURSEMENT AMOUNT:** \$ \_\_\_\_\_

Itemization (Please enclose receipts):	Amount
1. Postage	
2. Printing	
3. Meals & Refreshments	
4. Office Supplies	
5. Honoraria	
6. Travel	
7. Other (please specify)	

**TOTAL ADVANCE PAYMENT AMOUNT:** \$ \_\_\_\_\_

Itemization (please specify):	Amount
1.	
2.	

**SEND REIMBURSEMENT/ADVANCE PAYMENT TO:**

Amount:		Amount:	
Name:		Name:	
Address:		Address:	

Signature: \_\_\_\_\_

Print out and sign this form and mail to the CARL Treasurer. Include receipts for reimbursement.

**CARL Program Planning Manual, Appendix D2**



**PROGRAM FINANCIAL SUMMARY FORM**

Event/Title: \_\_\_\_\_

Date of Event: \_\_\_\_\_

Sponsoring Group: \_\_\_\_\_

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**PROGRAM INCOME**

No. of Attendees		Registration fee	Total Income
_____	CARL members	X _____	= _____
_____	Non-CARL	XX _____	= _____
_____	Students	X _____	= _____
_____	Other	X _____	= _____
_____	<b>Total registered</b>	<b>Total program revenue</b>	<b>\$ _____</b>

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**PROGRAM COSTS**

Postage/mailing \_\_\_\_\_  
Printing \_\_\_\_\_  
Room charges \_\_\_\_\_  
Refreshments \_\_\_\_\_  
Speakers' meals \_\_\_\_\_

Honoraria \_\_\_\_\_  
Speakers' travel \_\_\_\_\_  
Office supplies \_\_\_\_\_  
Other (specify) \_\_\_\_\_  
**Total program costs** \_\_\_\_\_  
**Balance** \_\_\_\_\_

Summary prepared by: \_\_\_\_\_ Date: \_\_\_\_\_

Please sign and mail this form to the CARL Treasurer within 2 weeks after your program.

## CARL Program Planning Manual- Appendix E

### CARL Policy on Honorarium for Speakers

In accordance with accepted ALA practice, CARL members who present at regular conference programs will not receive an honorarium or have their expenses reimbursed. Such participation is considered both a contribution by the member to the welfare of the organization and beneficial to the member. Honoraria and expenses for speakers who are not members of CARL will be negotiated by the IG in consultation with the Vice President in their region. The amount may vary depending on the speaker. The honorarium costs will be recouped from fees charged to attend the workshop. Honoraria may be paid to conference, IG workshop, or other CARL program speakers who are:

- Non-librarians in or out of state
- Librarians out of state
- Librarians in state who do not work as librarians but as consultants within an independent business.

Honoraria may not be paid to librarians who work in state.  
(Travel expenses may be paid to librarians and non-librarians in or out of state. Mileage is paid at the current CARL rate. Exceptions to this policy may be approved by the board on a case-by-case basis).

Please complete and submit the form below or send correspondence with the required information to the regional Vice President. The VP will communicate as to approval of the request.

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#### Request for Approval of Honorarium

Individual to Receive Honorarium

Name (First-Last) \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zipcode \_\_\_\_\_

Phone \_\_\_\_\_ E-mail \_\_\_\_\_

CARL Interest Group or Program  
Sponsor \_\_\_\_\_

Program  
Title \_\_\_\_\_

Honorarium Amount \$ \_\_\_\_\_

**CARL/IG Member Making Request**

Name Signature \_\_\_\_\_ Date \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Vice President's (Or approver's)

Signature \_\_\_\_\_ Date \_\_\_\_\_

**CARL Program Planning Manual- Appendix F**

**CARL IG PROGRAM SUMMARY FORM**

Before your program, appoint or assign a reporter to take program notes and write up a program summary. At the end of program, collect the summary and send it via email to the CARL newsletter editor. Please attach any photographs or other relevant documents.

Either use this form (paste into your email) or be sure that your summary contains the following information:

CARL Interest Group\_\_\_\_\_

Program Title\_\_\_\_\_

Program Speaker(s)\_\_\_\_\_

Program Date\_\_\_\_\_

Program Reporter\_\_\_\_\_

Summary of Program:

# GUIDELINES FOR CARL

## INTEREST GROUP REIMBURSEMENT

### **I. Interest Groups receive the following support from CARL:**

- supplies of CARL mailing labels;
- \$300 seed money for programming;
- partial subsidizing of programs at the discretion of the Executive Board;
- CARL stationery;
- CARL membership forms;
- CARL brochures;
- travel expenses according to the following guidelines;
- support for special projects according to the guidelines stated below.

### **II. Reimbursement for transportation to meetings.**

Chapter finances permitting, the following guidelines will be followed for the reimbursement of travel expenses for statewide meetings of CARL Interest Group Officers:

- a. Full reimbursement of airline flight expenses will be made for officers of Interest Groups; expenses for officers driving to meetings will be reimbursed at the rate of \$0.35 per mile (or the current rate) for every mile over 100 miles.
- b. The above reimbursement will be made to each Interest Group a maximum of one time per year.
- c. The above reimbursement will not apply to attendance at statewide meetings held at the CLA annual conference.
- d. It is expected that statewide meetings of an Interest Group will be located so as to reduce expenses as much as possible.

### **III. Special Projects**

Chapter finances permitting, the CARL Executive Board will consider the financing of Interest Group special projects according to the following guidelines:

1. The principal criterion for deciding to fund a proposal will be how well it meets any or all of the objectives of CARL, as stated in the CARL Constitution, Article III, Sec. 1.
2. Another criterion for funding decisions will be the state of the CARL treasury.
3. Proposals for special projects should be submitted to the Executive Board in writing and include detailed information on estimated costs and possible revenue.
4. The Executive Board may suggest that alternative sources of funding for a special project, such as ACRL, be considered before a decision is made to fund all or part of a proposal.

[Presumed date: 1986]; revised 2003