How to Host a Lifelong Learning Institute Conference
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Lifelong Learning Institute (LLI) conferences are a way of bringing LLIs together from your region — or even around the country — to discuss their missions, curriculum ideas and best practices; to share their troubles, find solutions, and to celebrate their many accomplishments.

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Usually a conference site is selected in the vicinity of an established LLI that agrees to be the conference host. The following materials explain that role in detail. There are some special advantages for the host LLI. With the conference close to home, members will have no travel expenses, so more of them are likely to attend. It is also a great opportunity to expand the horizons of the host LLI. Members who attend will get a larger perspective on the LLI movement and will be exposed to many new ideas and different ways of running an LLI.

Factors in site selection
Location is, of course, of prime importance. The relative ease and expense of getting to the site by air, rail or car will affect attendance. Location relative to the other LLIs in the area is also important. The more LLIs in the area, the greater the attendance will be. Other factors should include climate, cost, facilities, the general appeal and attractions of a city or area, and, of course, the enthusiasm of a host Institute!

Facilities
Participants seem happiest when the lodgings and conference sessions are all under one roof, and they’re especially happy when the food is good! Our experience in the past few years shows that hotels can be as economical, and sometimes more economical, than college campuses, because colleges are charging such high fees now for use of meeting space, A/V, custodial services, etc. The service and surroundings in a hotel are usually superior. The only thing missing is the “campus connection,” so you might consider having an event on campus in some way.

Choosing Dates
Although conferences can be held at any time of the year, they seem to work out best if scheduled during the latter part of the academic year, from March through April. Sunday-Tuesday dates work well. By staying close to a Saturday night, fliers can get super-saver rates.

Social Event
A special responsibility of the host Institute is to design and manage the social event for the conference. This does not need to be a fancy affair. The essential thing is to offer people a dinner opportunity that will be something different from the banquet in the hotel, which is the usual event on the first evening. If the location has much to offer in the way of restaurants and other attractions, it’s usually better to give people a free evening on their own. However, in this case, the host LLI organizes the formation of small dinner parties, arranges restaurant reservations, and addresses the logistics of transportation. If the location is more remote from nightlife, then it’s wiser to plan some type of dinner event for all conference participants.

People who attend conferences appreciate opportunities to have a unique experience in the area. The conference is an exceptional opportunity to highlight and showcase your hometown. It is always good to take advantage of attractions such as a local museum, historic home, theater festival, concert hall or cultural center. Providing a meal in conjunction with a tour or performance makes for a very special evening.

ADVERTISING
Using the Road Scholar Institute Network (RSIN) is the ideal way to advertise your conference. If you contact RSIN with information about your conference, we will update our website, send a “Save the Date” email announcement to all LLIs in the network as soon as a date has been set. We’ll also update all LLIs in the network on a regular basis about the upcoming conference. Other conference publicity should include direct mailing of conference materials to LLIs. LLI contact information is available on the RSIN website.

CONFERENCE-PLANNING TIMETABLE
• 9 months in advance: Site and dates confirmed; hotel rooms blocked; meeting rooms reserved
• 7 months in advance: Begin advertising the conference. Contact the Road Scholar Institute Network, so it can post information on the website. Send a mailing to all area Institutes with notice of date/site and a request for planning committee participation
• 6 months in advance: Mailing to planning committee to outline a plan of action.
• 5 months in advance: Program Draft I completed
• 5 months in advance: Mailing to all LLIs in area, requesting nominations of presenters.
• 4 months in advance: Progress report from planners and program draft finalized.
• 3 months in advance: All topics & speakers confirmed.
• 2 months in advance: Program printed and mailed.
• 2 months to the start date: Preparations for host Institute include recruiting volunteers, local publicity, planning a social event and arranging logistics.
“JOB” DESCRIPTIONS

Planning Committee
(The committee should be chaired by the host LLI or by co-hosting LLIs.)

- The planning committee is made up of representatives of several affiliate LLIs within the area. The aim is to have representatives from diverse LLIs, large vs. small, urban vs. rural, new vs. established.
- The essential role of the planning committee is to develop the conference program, identifying topics and recruits and confirm speakers, panelists, presenters and moderators, and promote the involvement of many LLIs.
- Guides the planning process and the overall development of the conference.
- Produces and distributes promotional materials and the conference program.
- Develops and administers the conference budget, including processing of all registration checks and payment of all invoices. Attendance fees should cover all conference expenses.
- The individual committee members serve as liaisons to their own Institutes, bringing back to their Institutes information about plans for the conference, generating enthusiasm for the conference, soliciting and relaying ideas and suggestions from Institute members.

Host LLI’s Local Arrangements Committee
(The Chair and committee members should be from the host LLI.)

- Designates one person to serve as liaison with the planning committee for purposes of conference planning and logistics.
- Identifies facilities for meeting and lodging; assembles information on costs of rooms and food service.
- Serves as liaison with campus if campus facilities are used.
- Designs and manages one evening social event (possibly including dinner) for all conference participants.
- Provides volunteers to conduct the on-site registration process, greet participants and acquaints them with facilities; and handles all on-site logistics.
- Provides information about local restaurants, historical sites and other places of interest.
- In general, extends hospitality and “personalizes” the conference experience for participants.
- Contracts with vendors.
- Creates registration database in order to process registrations, respond to information requests and send out conference confirmations.
- Provides on-site management.

Road Scholar Institute Network Staff

- Provides consultation as needed by email and phone.
- Posts conference information and updates on the Road Scholar website.
- Sends a “Save the Date” email announcement to all LLIs in the Network as soon as a date has been set.
- Updates and reminds all LLIs in the Network on a regular basis about the upcoming conference.
- May attend the conference and/or serve on panels and lead workshops

LLI CONFERENCE REQUIRED FACILITIES

The following needs are based on anticipated conference attendance of 150 people. This estimate will vary depending on your region, so adjust accordingly.

Meeting Rooms
- Auditorium (or large classroom) to seat 150, theatre-style. Breakout-session rooms: five or six rooms to seat 25-50 each, either theater, classroom or conference-style.

Dining Areas
- Reception area: You can offer a wine-and-cheese reception during the registration period on Sunday evening. This area might also be used for a breakfast buffet each morning. People appreciate a place to put their coats.
- Luncheons & Dinners: Seat 150 banquet-style

Lodgings
- 80-100 guest rooms (figure on half single rooms, half double rooms)
SURVEY OF LOCAL FACILITIES

For meetings and lodging, please use a separate form for each facility.

Name of facility contact person & phone: ____________________________________________

Location: _______________________________________________________________________

Access to transportation: __________________________________________________________

Closest major airport (note distance and drive time): _________________________________

Amtrak: _______________________________________________________________________

Bus: __________________________________________________________________________

Distance/drive time from interstate highway: _________________________________________

Meeting space: __________________________________________________________________

Estimated total cost: _____________________________________________________________

Comments on quality & convenience of meeting space: _______________________________________________________________________________

_______________________________________________________________________________

Lodgings cost per guest room: $___________ single / $___________ double

Comments on quality of guest rooms & other amenities of hotel: _________________________

_______________________________________________________________________________

_______________________________________________________________________________

_______________________________________________________________________________

_______________________________________________________________________________

_______________________________________________________________________________
MEALS/REFRESHMENT BREAKS FORM

Sunday reception: ____________________________________________________________________________________________________

Sunday dinner: _______________________________________________________________________________________________________

Monday breakfast: _____________________________________________________________________________________________________

Monday a.m. break: _____________________________________________________________________________________________________

Monday lunch: __________________________________________________________________________________________________________

Tuesday breakfast: _____________________________________________________________________________________________________

Tuesday lunch: __________________________________________________________________________________________________________

Other? ________________________________________________________________________________________________________________

TOTAL MEALS: __________________________________________________________________________________________________________
PRESENTATION PROPOSAL FORM

Organization: _______________________________________________________________

Name: _________________________________________________________________________________________________

Street Address: ________________________________________________________________________________________________

City, State, Zip: ________________________________________________________________________________________________

Telephone: _____________________________ fax: ______________________________ email: _______________________________

____ This is a proposal for a complete session (75-90 minutes).
____ Or a single presentation (please indicate your preference for a time slot of 20, 30 or 45 minutes).

Proposed name of session or title of presentation: _____________________________________________________________________

Format: ______________________________________________________________________________________________________

Summary of ideas to be presented: _________________________________________________________________________________

Moderator: ___________________________________________________________________________________________________

Speaker: _________________________________________________________________ Time allocated: _______________________

Speaker: _________________________________________________________________ Time allocated: _______________________

Speaker: _________________________________________________________________ Time allocated: _______________________

Speaker: _________________________________________________________________ Time allocated: _______________________

Time allocated for questions and answers, discussion: __________________________________________________________________

What questions for discussion could be raised? _______________________________________________________________________

_____________________________________________________________________________________________________________

What handouts will participants have in this session? (strongly encouraged) ________________________________________________

Will audio visual will be required? _________________________________________________________________________________

IMPORTANT: Please attach a typed sheet with a list of proposed moderators and speakers' addresses, phone numbers and email, if available.

I understand and agree that all moderators and presenters are required to register for the conference and pay the applicable fee.
Each of the people involved in this proposed presentation has agreed to honor this policy.

Signed: ______________________________________________________________________________________________________
IDEAS FOR SPEAKERS

- Faculty experts in older adult education from your host institution or other nearby schools.
- Elected officials in your state (governor, senators, representatives).
- Local authors or other well-known local celebrities (check with bookstores, organizations, associations or the Chamber of Commerce for suggestions).
- Road Scholar Ambassadors or Alumni (they speak for free about their travel/learn adventures).
- Speakers with national recognition in the field of older adult education.
- Representatives from the local medical society to talk on issues of advancements in the field of wellness for older adults.
- Local holistic practitioners to talk about alternatives to traditional western medicine.
- A panel of representatives from other LLIs to talk about how their LLIs operate.
- Local television or radio personalities. Weathermen are always popular.
- Newspaper columnists or editors.
- Representatives from local cultural institutions (museums, libraries, dance, theater).
- Local captains of industry.
- Well-known non-profit or service program leaders/directors.

TWELVE TIPS TO HAVE A SUCCESSFUL LLI CONFERENCE

1. Send out a call for proposals at least five months in advance of the conference.
2. The conference brochure should be mailed at least three months in advance of the conference.
3. A member of the Conference Planning Committee should be put in charge of contacting all the media in the area with announcements about the conference.
4. For LLIs in cold climates, conferences should be held between late March and early June. After early June, people disburse for the summer. Those LLIs in warm climates can hold a conference anytime from late October until early June. Early fall is not good since LLIs are just getting organized for the new year.
5. Try to centralize all sleeping rooms, meals and workshop accommodations as much as possible. There are several reasons for this. People may have heavy presentation materials to carry. They may have trouble walking or climbing stairs. They may not have a car. They may want to go back to their room during the day. It makes it much easier for all participants if all facilities are within easy walking distance.
6. Give conference attendees a good description of all the facilities. Tell them about the room, stairs, walking distances, etc. Describe everything fully. Are there hangers in the room? Will I have to share a bath? Do I need a car?
7. Have a locked room near the area where the workshops are being held that is available to hold all materials, handouts, etc.
8. End workshops by 4:30 p.m. so attendees will have time to go back to their rooms to rest and clean up before dinner. All after-dinner activities should be over by 8:30 p.m. at the latest.
9. Select a site that is willing to be very flexible in negotiating prices for everything. Try to avoid having to give a minimum commitment of attendees. Many things can affect attendance, especially at the last minute. Especially avoid sites that will penalize you if the minimum number is not met.
10. If possible, ask speakers to speak for free (conference pays expenses only). In all cases avoid highly priced speakers. A $100 honorarium should be the outside limit.
11. Always have back-up workshop presenters. Last-minute emergencies always arise and can leave holes in the workshop schedules. Avoid last-minute scrambling to cover the gaps. You can always ask some of your top LLI presenters who have very interesting topics to stand by in case they are needed.
12. Be sure to include a list of attendees, names and addresses, in the conference packet.
SAMPLE LLI CONERENCE PLANNING GUIDE

The following suggestions were compiled by the planners of the 2003 Mid-Atlantic Regional Conference of LLI (The Lifelong Learning Society of Christopher Newport University, and The Old Dominion University Institute for Learning in Retirement).

Brochure
Be prepared to spend some money on your brochure. An attractive, professional-looking brochure tells potential participants that your conference will be a professional, worthwhile experience. Make it look good.

You will need to identify a source of funds (perhaps around $1,000) for printing and mailing your brochure. At this point in the process, you won't yet have any income from registration fees.

Consider printing a sufficient number of brochures to provide one per member of the (your) sponsoring LLI; two or three per LLI in your region, and one per LLI outside your region. The RSIN can provide you with addresses. Don't be tempted to omit the LLI's outside your region; one or two of these participants in your conference can be a valuable addition, and you may be providing a much-needed conference opportunity to someone whose own region has been unable to host a recent conference.

Plan to mail your brochures about four months prior to the date of the conference. If you mail them earlier, people may misplace and forget them; if you mail them later, people may already have made other plans.

Communication
Make it as easy as possible for potential conference attendees to receive and send information. Establish:

- An email address
- A telephone that will be manned during normal working hours, and for after-hours, a voice mail or answering service
- A conference website containing:
  - A copy of the conference brochure including:
  - The schedule of conference workshops and activities
  - The conference fees
  - Information on the conference location and how to get there
  - A registration form that can be downloaded.
  - The conference contact phone number, address, email address.

Conference Facility
If you hold your conference in a hotel, consider the following:

- Plan to book the hotel about 10 months in advance.
- In the beginning, base your plans on 100 attendees. Discuss with the hotel the necessary cut-off dates for increasing or decreasing that number. Try to arrange a contract that does not penalize you unduly if you have to decrease the number of attendees.
- Be sure you understand what you will be charged in the event you have to cancel the conference. Try to arrange a contract that is as lenient as possible in this regard.
- Arrange for the participants to make their own reservations directly with the hotel and pay their own bills. Your LLI will then have to pay only the food bill and meeting room fee.
- Be sure all prices quoted to you are inclusive of all taxes and gratuities.

Some questions to ask the hotel:

- Will the guest-room rates apply for several days before and after the conference?
- Will you be charged a separate fee for each meeting room you use, or a daily fee that covers more than room? Be sure you understand exactly which rooms are included.
- Can you get the necessary audio visual equipment from the hotel, or must you provide your own? If the hotel provides it, ask for a price list so you can clearly understand what you will be charged for each piece of equipment.
- What is the hotel's cut-off date for receiving reservations? (You'll need to put this information in your conference brochure)
- Will you have to pay the hotel a deposit? (Since you won't have collected any money yet at this point, try to arrange to not have to pay this "good faith money.")
- When will the hotel expect to receive full payment? (Probably on the day of departure)
- When will check-in/check-out time be?
- Will the hotel offer any complimentary guest rooms, upgraded rooms or hospitality rooms?
- Is there a restaurant in the hotel? Will it be open during the conference?
Conference Fee
To determine the full conference fee and the single-date rate, you’ll need to know:

- cost of all meals, refreshment breaks, opening reception and meeting-room fees (calculate the total, and the per-person cost)
- cost of the optional social event, if you have one (both the total, and the per-person cost)
- cost of printing the conference brochure
- cost of mailing the conference brochure
- cost of printing and mailing registration materials
- cost of attendee packets
- guest speakers fees, cost of their meals, need for VIP quarters, and any other meals you will pay for
- cost of travel, meals and accommodations of the EIN rep, if invited
- cost of email account, special phone-answering service, etc. if needed
- cost of audio visual equipment

Finances
Consider opening a temporary checking account in which to deposit registration fees. Be sure your agreement with the bank allows you plenty of checks. You may find that you have to write more checks than you anticipated before it’s all over.

Food
Provide breakfast every day. Attendees usually prefer a full sit-down breakfast, but if your food budget needs trimming, a continental breakfast will suffice. You may also find that your schedule of activities and/or meeting room availability does not permit serving and eating a full breakfast.

Provide lunch every day. Discuss with the caterer the merits of plated vs. buffet lunch. There are considerations of cost, time allowed for the meal, and size of the dining room.

You may want to offer some sort of optional activity/meal in place of one of the evening meals. For each meal you offer, give your attendees a choice of two entrees plus a vegetarian. This should accommodate most religious, dietary and lifestyle requirements. Attendees will be disappointed if they aren’t offered desserts.

Planning Committee
You’ll need someone responsible for each of the following areas:

- Chairman (or co-chairmen)
- Registration
- Receive and record registration
- Send registration confirmations
- Keep track of money and deposit it, or turn it over to treasurer
- Maintain updated roster of attendees
- Prepare name tags and attendee packets
- Receive attendees on opening day
- Conference facility (lodging, meeting rooms, meals)
- Obtain contract and make arrangements for participant lodging, meetings rooms, and meals
- Program
- Determine topics of workshops
- Arrange for LLI members to conduct panel discussions
- Obtain keynote speaker and others, as required
- Plan conference workshops and obtain people to conduct them
- Conference brochure
- Design, print and mail
- Website
- Design, maintain and update as needed
- Social events
- Plan and make all arrangements
- Arrange for flowers and other details for opening banquet and reception
- Treasurer
- Draw up a budget
- Determine conference fees to be charged
- Open a bank account
- Deposit all money received
- Pay all bills and keep all necessary records
- Communications
- Establish and maintain email, telephone, answering service, as needed
Program

- Appoint someone who will contact the presenters in advance to find out what audiovisual equipment they will need. You will probably need more than you think. Be sure to include plenty of money in your budget for this possibility.
- Don't schedule free time; instead, use it to repeat some of the more popular sessions.
- Be sure to offer a session by the EIN rep. Participants appreciate the opportunity to learn about EIN and to ask questions about it.
- Consider having “rap sessions” in the evening after dinner, so participants can share their experiences on various topics.
- Plan for a way to share notes (or summaries) from each of the speakers and panelists with all attendees. Give this information to the RSIN as well.
- Consider allowing two hours per session: 1½ for presentation, 30 minutes for Q&A.
- Be sure to schedule some time on check-in day for the moderators and panelists to get together.
- Most of the people who attend these conferences are involved in the leadership of their organizations. You may be able to increase the number of participants in the conference if you can include some topics that would be of interest to the general membership.

Registration

- It will be much easier for all concerned if you are able to accept credit-card payment.
- Many universities will pay the registration fee for their LLI members. They may want to use a purchase order from your university. They will need to know your university's tax-exempt number.
- You may want to offer the option of attending the full conference, or single days only. Be sure your registration form states clearly whether meals, refreshments or conference materials will be included in the single-day rate.
- Consider offering an early bird rate that will be available until approximately 30 days prior to the conference. Most people will take advantage of this rate, giving you a feel for how many participants you may get.
- Send each registrant a confirmation letter or form confirming, - which sessions the participant wants to attend.
- the participant’s meal choices
- any attendance or meal choices for participant’s guest
- The registration form should provide for the participant’s name, the name of their LLI, and the sponsoring school. Also indicate whether or not the participant will be staying in the conference hotel.

Registration Packet

Consider including the following in a packet to be received by the participants upon check-in at the conference site:

- A large name tag with the participant's name, the name of his/her LLI, the name of the sponsoring school, and the city and state. Most people prefer a name tag that can be worn around the neck, rather than the pin-on type.
- A list of restaurants in the local area (if you are offering a free evening).
- A list of participants that includes the name of the LLI, sponsoring school, city and state.
- A conference evaluation form.
- A conference schedule with meeting-room assignments.

Social Events

The conference usually opens with a banquet. A pre-dinner ice-breaker, such as a cocktail party or reception, helps people get acquainted.

You may want to offer a free evening, with the option of attending an event planned by you, or eating out on one's own. Include this choice on the registration form so the participants make their choice early and pay the additional cost, if there is one, in advance.

To learn more about the Road Scholar Institute Network, visit our website at http://www.roadscholar.org/rsin