



NYLA Unit Event Planning Procedure

When a NYLA Unit decides to hold an event, the process/procedure is as follows:

- 1) The Unit will select a main point of contact for the event, hereby referred to as the "Unit Event Contact". The Unit Event Contact is responsible for communicating directly with NYLA staff on behalf of the Unit and sharing event information with their Unit. A limited number of additional Unit contacts may be mutually determined as needed for specific communication purposes directly with NYLA.
- 2) The Unit Event Contact will schedule an initial meeting with the NYLA office to establish contacts and determine deadlines and/or target dates for required information exchanges noted throughout this document. This meeting must be scheduled at least 6 months prior to the proposed event date.
- 3) A shared budget document will be maintained and used by both the Unit Event Contact and the NYLA office. Reimbursement/disbursement deadlines will be mutually agreed upon and noted in this document.
- 4) All contracts, budgets, planning documents, and other records relating to the event will be located in a shared folder accessible to both the Unit Event Contact and the NYLA office. Additional access permissions may be granted as needed.
- 5) The Unit Event Contact will contact the NYLA office and provide an estimated budget (income and expense) for the event, and basic information needed for the RFP (region of the state/date/general schedule/number of breakout rooms/rough estimate of number of attendees, etc.).
- 6) The Unit Event Contact will schedule a meeting with the NYLA office to go over the information provided and finalize the RFP.
- 7) The NYLA office will then work with the local Visitor Association and put out an RFP for venues in that area that fit the needs of the event and collect proposals from those venues.
- 8) The NYLA office will provide a selection of venues from which the Unit will select a venue.
- 9) Once the Unit selects a venue from the list, the Unit Event Contact will notify the NYLA office and the NYLA office will reach out and contract with the venue. Options for concessions in the contract will be mutually agreed upon by the Unit Event Contact and NYLA.
- 10) Once the venue has been finalized, the NYLA office will provide options for A/V, pipe and drape, and menus to the Unit, and the Unit will make their selections.
- 11) The Unit Event Contact will schedule a meeting with the NYLA office to go over selections and details for the registration form (timeline, pricing, dietary restrictions, special events, etc.).
- 12) The Unit will handle the selection of speakers and creative content, with the understanding that the NYLA office should be informed of negotiations and all contracts must be signed by the NYLA Executive Director.
- 13) The NYLA office will create the registration form, handle the registration process, and provide a spreadsheet of registrants and vendors updated weekly to the Unit Event Contact.

- 14) The NYLA Executive Director must sign all contracts.
- 15) The NYLA office will send staff to the event to work at the Registration Desk for the entirety of the event, and/or help with scheduling and training volunteers.
- 16) NYLA will create and assemble printed name badges, meal tickets, and badge holders, unless otherwise arranged with the Unit Event Contact.
- 17) The Unit Event Contact will submit all reimbursement/disbursement requests to the NYLA office by the mutually agreed deadlines, with receipts and required Unit signatures.
- 18) The NYLA office will pay all reimbursements/disbursements via check within 30 days of the event, and/or final submission deadline after the event.
- 19) NYLA will provide a final report to the Unit Event Contact within 60 days of the event that includes total registration numbers by type, total expenses, pending disbursements/reimbursements, and total income.