
CRCEA Conference Manual



This conference manual is designed to standardize procedures for hosting a CRCEA conference. It encompasses many years of experience, and is intended to be used as a guideline. Due to the variables in planning these types of events, there are no hard and fast rules. Our intent is to be as thorough as possible, however it may not cover every contingency. When problems cannot be resolved locally, contact the CRCEA Conference Chairperson.

This manual is available on CRCEA's web site (www.crcea.org). However, a hard copy will be made available to host counties well in advance of the conference to guide them with conference planning, upon request.

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SECTION I - ADVANCE PLANNING

Due to the number of member associations in CRCEA, and even considering the fact that some counties may join with at least one other county to host a conference, most associations can plan on hosting a CRCEA semi-annual conference about once every eight years. Knowing this, a conference planning committee should be formed no less than two years prior to the association's scheduled event. Past hosting committees have found that the process of selecting a hotel for their event may even need to begin as soon as three years prior to the scheduled date.

Prior experience in negotiating contracts is extremely helpful, but not a requirement. However, it is suggested that the site selection committee be composed of at least one person with prior experience in this process, if possible. If no one is available locally, contact the CRCEA Conference Chairperson for assistance, as they have been through the process many times. Also, it is extremely important to make sure the CRCEA Conference Chairperson has an opportunity to review any hotel contracts before they are signed. This small step could save your association thousands of dollars and assure that you have covered all legal requirements for your association, the hotel, and CRCEA. Also, it is important to remember that individual associations do not have the authority to sign a contract which binds CRCEA to that contract without written approval from the Executive Committee.

The host conference committee should develop a timeline chart of tasks to coincide with scheduled deadlines (Refer to Form # 1 on Page 29). In the instance where two counties are collaborating to host the conference, the hosting county's conference committee should include members from both associations. While collaboration of associations is encouraged, this process could take additional time to make decisions, and this should be taken into consideration when beginning the planning process. The initial planning meeting should include the CRCEA Conference Chairperson or their designee, if possible.

Members of the hosting conference committee should make every effort to attend Conference Committee meetings at as many CRCEA conferences as possible prior to their event. These meetings always include members from past conferences and those scheduled prior to your conference. The information gained from networking with these groups is invaluable in the planning process. At these meetings you can discover what worked and what did not, and this information may prevent you from duplicating someone else's mistakes.

The ongoing cooperation and communication between the host committee chair and the CRCEA Conference Committee Chairperson will guarantee a successful conference.

A. MONTHS AND DAYS OF THE CONFERENCE

Prior to the Spring 2017 Conference in Ventura County, the accepted dates for CRCEA conferences had traditionally been the second or third week of April (Spring) or October (Fall). In Ventura, the delegates voiced their opinion that the hosting county should be given more latitude in choosing the date for their conference.

In July of 2017, the Executive Committee approved the concept of allowing the host county to pick a conference date between March and May for the spring conference, and between September and the first two weeks of November for the fall conference. The only caveat being that, according to CRCEA Bylaws, there cannot be more than seven months between conferences. Therefore, a change in traditional dates for the conferences must be approved by the CRCEA Executive Committee prior to the hosting county signing a hotel contract.

Because of the CRCEA Bylaws seven month time requirement, any changes in the traditional conference date by one Association must be taken into consideration by the subsequent Associations following the conference with date changes. It is the responsibility of the Association wishing to adjust conference dates to inform the next two Associations on the rotation schedule.

The committee members negotiating the contract should also offer the hotel the option of picking the dates (within a range offered) for the conference. It could be that a week earlier or later than the date chosen by the committee might be better for the hotel, and subsequently result in a lower rack rate. (Note: The term “rack rate” is the term used by hotels to describe the price of their standard room rate before any promotional discounts are applied.)

The days on which the conferences are held have traditionally been Monday through Wednesday. As of July 2017, hosting conference committees will have the option of holding their conferences on days of the week which will allow them the most flexibility in contracting with local hotels. Thus, holding a conference on Friday through Sunday in a business oriented location, e.g. Alameda County, as opposed to a resort oriented location, could provide an incentive for the hotel to offer lower pricing.

B. OTHER EARLY CONSIDERATIONS

The Host County Conference Committee should decide early in the planning process if they wish to have a theme for their conference. This decision could affect the initial design of the program cover which might reflect the theme, local history, or characteristics.

Early program planning is essential, and previous conference programs should be reviewed to avoid repetition. The CRCEA Conference Chairperson can assist wherever necessary in planning, and at times, may also be able to assist with booking the speakers.

Another very important consideration that must be discussed early with the hotel is their policy for bringing food or beverages into the hotel from an independent supplier. Many hotels with union contracts will not allow food or drink of any kind to be consumed, unless it is supplied by the hotel. This will directly affect how the conference committee plans for the Hospitality session.

C. HOTEL SELECTION & ARRANGEMENTS

Depending on local economic conditions, the hosting county should reserve conference facilities no less than twelve (12), and as much as thirty six (36) months in advance, per the aforementioned reasons. The site selection committee should be cognizant that most hotels will book their group meetings/conferences a year or more in advance. Also, keep in mind that some of the smaller hotel chains may have more negotiating room than the larger, corporate controlled hotels.

1. Hotel Location

While it would always be preferable to host the conference in the county where the hosting association resides; that may not always be feasible in the future.

Some of the smaller counties, and even some of the mid-sized counties in the central valley, have complained that there is far too little selection of hotels in their areas to be able to compare more than one location. Then there is the opposite issue in some of the more

heavily populated or resort-type areas, which are so busy, the hotels do not feel they need to negotiate terms in a contract. This ‘take it or leave it’ attitude will make selecting a quality property for a reasonable rate extremely difficult.

When these issues arise, the Executive Committee (ExCom) would be willing to discuss the possibility of moving the conference location to an adjacent county with more favorable rates and facilities. This consideration will be on a case by case basis, and must be approved before the hosting county makes a decision to look outside their county.

These situations would be the perfect time to discuss a joint conference venture with another county. However, the consideration must be made regarding the geographic location of each county. The farther apart the counties are, the more difficult a joint conference might become. Also of prime concerns would be whether the county is in a North or South zone for determining what time of year the conference will be held.

When considering a contract with a hotel, the following items should be included:

- **Easy Access to Mass Transportation** - Since many people who are attending your conference from all over the state, the closer the hotel is to an airport, rail station or some other mode of transit will encourage more people to attend. It has been found that the easier it is to get to a particular location, the more likely it will be that you will get better attendance.
- **Accessibility** – If the hotel has no elevator, or rooms to accommodate the physically challenged; this should be good reason to keep looking for a more appropriate meeting location. Any hotel chosen must be in compliance with the Americans with Disabilities Act (ADA).

2. Lodging and Minimum Rooms

In past years, it was recommended that a minimum of twenty-five (25) rooms be guaranteed for each night of the conference, including the night before the first day of the conference. This minimum standard was based on the fact that there are 20 delegates and 5 Executive Committee members on the CRCEA Board. These numbers have increased over the years as more and more members from each association have become interested in attending.

Lodging minimums should be taken into consideration when the locale for the conference is considered a resort-type destination, i.e., San Diego, Santa Barbara, Ventura, etc. In these instances, more members may plan to attend and bring their spouses, so the conference committee should plan appropriately.

Past bookings for the above noted counties have usually committed to 40/50/50 rooms for the 1st, 2nd, and 3rd nights, respectively. Also keep in mind that the hotel will only hold the host county liable for 80% of the contracted number of rooms. In this instance, this county would only have to guarantee 112 room nights over the three days.

It is highly recommended that the person negotiating the contract attempt to get the hotel to guarantee the same price if there is a need to increase the number of rooms at a later date. If this is not written into the contract, there is a high likelihood that the host county would have to pay a higher rate for additional rooms.

In addition, the negotiator should attempt to get the hotel to agree to extend the conference price for at least two days prior to the conference and two days following the conference. However, this stipulation should not be a deal breaker, and it is often not allowed in resort-type communities.

Another reason, aside from the obvious, is to get everything in writing as the sales staffs for hotels are often highly transitory, and move around on very short notice.

It is possible that the person you are dealing with when negotiating the contract will not be the one you will be working with during the conference in two or three years. Also, because of this fact, it is absolutely imperative that the conference committee maintain an ongoing communication with management and staff at the chosen hotel.

After signing a contract with a hotel, try to meet with their staff on a regular basis to update them on the planning process. Most hotels will provide meeting space for the conference committee meetings prior to the conference, at no charge. Some will even provide lunch for the committee members.

3. Room Reservations

As previously stated in the planning section, the very minimum number of rooms for a conference will be twenty-five (25) rooms for each of the 1st, 2nd, and 3rd nights for a total of seventy-five (75) rooms over three nights. Try and get the hotel to let you block the minimum, and to promise to release more rooms if needed later at the same rate.

The conference committee chairperson should consider contacting the CRCEA Secretary to have an email sent to all Association presidents, and/or delegates, in an attempt to determine how many persons each association plans to send to the conference. **This communication should be made prior to the final cutoff date required by the hotel to guarantee the minimum number of room nights.**

The hotel may offer a one or two room suite as a bonus for booking a certain number of rooms. These suites have been used in the past for the hospitality room, but as mentioned earlier, this arrangement allows for very limited movement and networking. The host association will often provide this complimentary suite to the person sponsoring the Hospitality session (for storage needs), and that has traditionally been one of CRCEA's Affiliate members.

1. Room reservations are to be made with the hotel directly. This information should include the ability to register via the Internet. The hotel should also supply you with local information, restaurant locations and maps to include in the conference registration packets.
2. The CRCEA Conference Chair will assist with putting the hotel registration information on the CRCEA web site, as well as any 'Save the Date' flyers the association develops.
3. Negotiate with the hotel to comp (not charge for) any additional rooms needed, i.e. meeting rooms, hospitality room, or sleeping rooms. Most hotels will offer one free sleeping room for every 40 or 50 rooms booked. These rooms can be used for speakers who must travel, or for committee members needing extra space, i.e., the door prize chairperson.

Unfortunately, when the economy is good, and the hotels are booking their facilities easily, they are more likely to charge for meeting rooms. However, if the committee books early, the hotel may give a break on the room rental fees due to having a guaranteed booking several years in advance. Also keep in mind, in the past few years rates have continued on a meteoric rise, which is another reason to book early.

4. Most hotels will have a food and beverage (F&B) minimum which they require be met before they will waive the rental of their meeting rooms. This F&B minimum is negotiable in most cases, but must be taken very seriously. However, keep in mind

that even if the F&B minimum is met, some hotels will still charge a “reduced rate” for the meeting rooms, and that must be considered in the budget.

Be sure to ask what is included in the F&B minimum count. Some hotels will include the cost of breakfasts, while others will not. Some will include wine sales, but not the bar setup in the banquet room. The F&B minimum could be a deal breaker if the conference committee is considering eliminating the banquet. Not making the F&B minimum could result in room rental charges, and a very high and unexpected expense for the hosting county.

4. Meeting, Hospitality, and Banquet Rooms

a) Meeting Rooms

Meeting rooms should be set up in a classroom style, and include sufficient room for a riser that will accommodate a table and chairs for up to six persons. This set up is important for the Business Meeting on the final day of the conference. The arrangement of the room should be dependent on the most logical direction to access audio visual equipment, i.e. a projector or screen. There should also be sufficient room for tables which can display Association Reports, Association Newsletters and Affiliate handouts. There should be water and glasses provided in the room, either on the classroom tables or at some other point in the room. Writing paper and pens should also be provided by the hotel for each attendee.

b) Banquet Room

Banquets should be set up with rounds of no more than eight persons per table. A dance floor can be included in the contract if there is entertainment which might induce dancing. A stage can also be included if necessary for specific types of entertainment.

Under no circumstance should the banquet table arrangement be used for the meetings. With this arrangement, there are always a good number of people who will have their back to the speaker, or the A/V equipment. Banquet rounds are usually meant to be covered with a table cloth, and this makes note taking difficult.

c) Hospitality Room

The Hospitality Room must accommodate a **minimum of 100 persons**. It can be a large room, or two smaller rooms co-located with a patio, and it should have a wet bar, if possible. While some Associations have used a two bedroom suite in the past, this practice has been highly criticized by those attending the event. There is often not enough room under these circumstances to provide adequate space for each attendee to be served, and still provide space for networking.

It is extremely important that the negotiating team learn early in the process whether the hotel will allow outside food and beverage to be brought into the hotel. Often hotels with union employees are restricted by contract from allowing outside food or beverage into the hotel. If this is the case, hosting counties have had success getting Affiliates to donate funds to offset the cost for a hotel provided food at hospitality time.

Keep in mind that some hotels will provide a nightly hospitality hour, including drinks and appetizers, as part of your stay in the hotel and at no extra cost. This could be a major cost savings and utilized as the Hospitality Room requirement.

5. Audio Visual Equipment

One of the biggest expenses required when hosting a conference can be the Audio-Visual (A/V) equipment. Determine early in your contract negotiations as to whether the hotel will allow the association to bring in an outside contractor, or if equipment belonging to the

association may be used in lieu of hotel equipment. Make sure any permission is written into the contract.

Minimum A/V considerations should be:

1. Power Point set-up: operator, laptop computer, projector, screen and A/V cart.
2. Podium with microphone (must have)
3. Extra portable microphone (must have)**
4. Each speaker should be contacted early to ascertain his/her A/V requirements
5. Riser for all presentations

Always try to get the hotel to comp at least some of your A/V needs in the contract, i.e., microphones, projection screens, and an A/V cart or stand.

**It is extremely important to have a volunteer preassigned to the task of providing the portable microphone as needed around the room. This is necessary so all attendees can hear the questions, as well as the answers. It might be possible to have a fixed microphone stationed in the center of the room, and require those wishing to speak to walk up to the designated microphone.

Make sure the program chairperson meets with the hotel's A/V technician to discuss your minimum requirements, and determine any additional costs. Be sure to obtain a price list that indicates costs of using items such as a podium, digital projector, wireless microphones, lapel microphones, projection screens, or the use of hotel sound system in the meeting room. Don't assume any equipment is included unless it is written into the contract.

Audio-visual equipment rentals in a hotel are always very expensive, and most hotels now contract outside the hotel for their A/V needs and the cost is often prohibitive. An example of one hotel's A/V pricing is included in the addendum section of this manual for planning (Page 28). However, remember these prices are from a 2016 price list, and today's prices will likely be even higher.

Determine if there are any charges/restrictions for bringing in your own equipment. If possible, try to get the hotel to allow you to bring in your own equipment and technician(s). If this is not permitted, try to at least provide your own laptops and digital projectors which can normally be borrowed from members within your association.

Recently, CRCEA members from other associations have agreed to provide this service, and the CRCEA Conference Chair may be able to provide additional assistance with this need. If you contract with someone for this service, make sure the contracted party and the hotel A/V technician become best friends during the conference.

6. Meal Considerations

Since your conference will have 100+ attendees for your presentations, some consideration must be made regarding lunch arrangements. It is critical to determine if the hotel has the capacity to feed your attendees in 1 to 1 1/2 hours. If not, and there are not enough restaurants in the very close vicinity, this hotel may not be capable of hosting your event.

If the hotel has the capacity, but would be unable to serve your attendees in the time allotted, it may be possible to book a prefix lunch. This would provide for a particular menu for all attendees at a reduced rate. An example of this type of menu would be boxed lunch (sandwich, salad, chips, etc. and a choice of drinks) which could be prepared in advance and served quickly.

Attendees will also be on their own for dinner at least one and maybe two nights while they are attending the conference, so having a good selection of restaurants nearby would definitely be a plus.

7. Additional Equipment Needs

a) Flags

1. An American flag to the left of the podium, or head table, as you face it
2. A California State flag to the right of the podium, or head table, as you face it

b) Tables

1. Two (2-3) tables at the back of the room for the coffee breaks, or outside the room near the entrance to the room
2. Two (2) tables at the back of the room for Delegate Reports and handouts
3. Two (2) tables (or more as needed) for Affiliate related literature, or outside the room near the entrance to the room

c) Hospitality Room(s)

How the Hospitality segment of the conference is planned will be determined by whether the hotel will allow the hosting association to bring in food and beverage from outside. Often, hotels with union employees are bound by a contract which disallows this process.

If the hotel will allow the hosting association to provide for the Hospitality segment, the following should be considered:

1. Usually one (1) very large room, or two (2) smaller adjoining rooms, which can accommodate at least 100 people, is needed. If the rooms are located on the first floor, often the pool area or patio can be used to handle the overflow.
2. Find out if a CRCEA Affiliate is willing to sponsor the event and supply food and beverages. If food and/or alcoholic beverages are sponsored by an Affiliate member, it is the responsibility of the host county to make arrangements for the event directly with the Affiliate.
3. Finger food is usually served during the hospitality hour, either catered by the hotel or furnished by the host association, if permitted. More food is usually served on first day than the second day, due to the banquet being held on the evening of the second day of the conference. Contact the CRCEA Conference Chairperson for ideas of what has been served at past conferences.

d) Coffee Breaks

There are usually four coffee breaks:

First Day – 3:00 PM, Second Day – 10:00 AM and 3:00 PM, Third Day – AM

e) Coffee Break Menu (Suggested)

Mornings – Coffee, regular and decaf, hot tea. Pastries and fruit should be provided if no breakfast is offered.

Afternoons – Coffee, assorted diet and regular sodas, iced tea, assorted cookies, and/or fruit. Often hosting association will provide specialty treats such as root beer floats, ice cream bars, fresh baked cookies, etc., depending on budget considerations.

f) Banquet Dinners

1. If possible, offer at least three entrée choices, i.e., beef, chicken or fish, plus vegetarian, and make sure the price includes dessert. Try to maintain a reasonable price, but be cognizant that some areas will have higher food prices than others. In 2017, it was determined that \$50.00 was the maximum price conference attendees were willing to pay for a chicken or fish dinner. The Hotel will require a guaranteed count approximately seven (7) days before the conference, and you will have to pay for that number whether or not the meals are consumed.
2. Whatever menu you select, all entrees should be the same price for all attendees.
3. If desired, determine if wine can be provided by the hosting association. If the answer is yes, there may be a “corkage” fee, and if so, how much is it per bottle. If not, what is the fee for hotel provided wine per bottle.
4. Lastly, there is no absolute rule that a hosting county must have a banquet. There may be other options that would be just as viable. Talk to the CRCEA Conference Chair if you have other ideas.

g) Entertainment

Make sure the room chosen for the banquet is a size large enough to accommodate the entertainer’s needs, including a microphone, risers, dance floor, etc. Some bands will provide their own sound system, which they will often allow the host association to use to make announcements or give away door prizes. Check on this possibility at the time of the booking of the entertainment. This could save on A/V costs.

One or more tables may be required if there are door prizes.

h) Decorations

Any type of table decoration that is allowed by the hotel, handmade or purchased, are acceptable and may be given away as door prizes following the banquet.

i) Door Prizes

Offering door prizes at the banquet is completely at the discretion of the host association. Door prizes can be collected in a number of ways which include solicitation from the association membership, donations from Affiliates, local businesses or money from funds set aside by the Association’s conference committee.

Consideration should be given to the fact that some conference attendees will be flying to the conference, and cannot transport large gifts. Keep in mind that a gift certificate from a local business, or restaurant, may not be as useful to some people who live a far away.

D. HOTEL CONTRACT

- Read the contract very carefully. **Do not accept any liability for the conference at the hotel.** If the hotel has a liability clause, or requires the hosting association to provide security, and will not waive it in writing, go somewhere else. **Do Not Sign It.** This issue has been researched previously with legal counsel, and we have been advised that this is not a responsibility the associations should consider.
- If you are not sure, contact the CRCEA Conference Chair, and they will have the contract reviewed for liability issues which could cause problems later.

Often the hotel will put this type of wording into the contract, and if it is not caught, the hotel receives a free liability waiver. However, if the wording is challenged, the hotel will eliminate it from the contract almost every time.

If the hotel requires an insurance rider, or some type of waiver, check with the CRCEA Conference Chair to determine if CRCEA's insurance will suffice for the hotel's requirements.

- Send a copy or copies of your contract(s) to the CRCEA Conference Committee Chair for Executive Committee (ExCom) review prior to signing. (Some hotels require separate contracts for food, rooms and audio visual.) This is another reason why the hotel selection process needs to be started early. It takes time for a legal review if required.

Officers of the ExCom have reviewed many contracts, and may be able to help avoid misunderstandings.

REMBEMBER: You cannot sign for CRCEA without authorization from the Executive Committee. You may sign for your local association with your Board's permission.

- Discuss food requirements with the hotel's catering personnel very thoroughly. Be specific. Try to get hotel to commit to food costs as soon as possible to avoid last minute price increases. (Written and signed confirmation of food costs should be obtained as early as possible so that costs cannot be increased at the last minute.) However, be aware that most hotels will not commit to a firm food charge until approximately six months before the event.
- A pre-conference deposit to the hotel is normally required, and is usually a percentage of the total costs. To assist with this expense, CRCEA will provide up to \$2,000 seed money to offset this early deposit requirement. Additional funds may be available, up to a total of \$2,000, on a case by case basis. This seed money should be considered a loan, and the host county is expected to repay this money at the end of the conference. The committee chair should contact the CRCEA Treasurer early in the site selection process to apply for the described seed money.

The seed money repayment has been waived in the past in hardship cases when the hosting association has lost a large amount of money. This waiver must be applied for in writing, and approved by the Executive Committee on a case by case basis.

Each association is expected to fund some portion of the conference, and these funds should be budgeted over the eight years between conferences.

- Examples of hotel contracts from previous conferences may be obtained for comparison from the CRCEA Conference Chairperson.

E. CONFERENCE ANNOUNCEMENT AND PROGRAM

- At least 120 days prior to the conference, the tentative agenda should be submitted to CRCEA's Executive Committee for approval.
- The CRCEA Secretary will provide a set of mailing labels with the names of delegates, officers and other potential attendees who should receive an invitation

packet. It is up to the Host Planning Committee to invite their local association members and retirement office officials.

- The host association shall prepare a conference invitation packet at least 60 days prior to the conference, and it will be mailed to all potential attendees no less than 45 days before the conference date. The packet should include: a registration form, CRCEA President's invitation letter; host association invitation letter; hotel location and contact information; and tentative agenda.
- Samples of the various forms and documents needed are included in the addendums section of this Conference Manual (See Page 28).
- The CRCEA Conference Chair will assist the host association in designing the program. CRCEA will print and pay for the conference programs, and arrange to have them delivered to the host association.
- Since it will probably take several drafts to get a finished product, the program chairperson needs to work closely with the CRCEA Conference Chairperson to provide all necessary information for the program as early as possible.
- This information should include at least five or six high quality photographs which can be used throughout the program to promote highlights of the host county. These photos are often of famous monuments, tourist attractions, or just show the beauty of the county's geography.

F. COMMITTEE ASSIGNMENTS

At a minimum, the following positions should be designated early in the conference planning process:

1. Conference Chair (and Co-Chair - Should two people want to work together)
2. Conference Registration Chair
3. Conference Treasurer (often the Association Treasurer)
4. Program Chair
5. Banquet and Entertainment Chair (These assignments could be separate)
6. Door Prize Chair (if door prizes are to be provided)
7. Hospitality Chair (Could be the same as the Banquet Chair)
8. Donations Chair (This position is needed helpful for counties with limited budgets)
9. Spouses Activities Chairperson*

*See Spouses Activities Section on Page 18

1. Conference Chairperson

- Determine most qualified members for the site selection committee.
- Plan and preside over all Conference Committee meetings.
- Assign the Treasurer and all Committee Chairs.
- Assist the Treasurer in formulating a budget.
- Act as liaison with the hotel management and staff.
- Act as liaison with the CRCEA Conference Chairperson.
- Provide copy of contract and preliminary program to CRCEA for approval.
- Determine ASAP whether there will be a conference 'theme'.
- Assure the meeting rooms are set up properly, per the contract.
- Oversee and coordinate all conference activities.
- Assure that all deadlines are met and review budget issues

- Receive conference materials and distribute to the appropriate committee chairperson.
- Assist in soliciting funds from sponsors and Affiliates.
- Assure the final Conference Report is sent to the Conference Chairperson in a timely manner.

2. Registration Chairperson

- Recruit assistants to work at the registration table during the conference to greet attendees, pass out registration materials and answer questions.
- Solicit Invitation Letter from CRCEA President.
- Obtain mailing labels from CRCEA Secretary for registration distribution.
- Obtain name badge holders from CRCEA Conference Chair.
- Design and print name badges (The Avery Software Company has several free computer programs for this purpose) A sample of two previous badges can be found in the addendums section in the back of this manual on Pages 33 and 34.
- Obtain “Goody Bags” for registration gifts and materials from the CRCEA Conference Chair.
- Collect registration packet materials, purchase envelopes, make copies and mail by required date. Mailing list should minimally include:
 - Delegate (Complete Packet)
 - Alternate Delegate (Complete Packet)
 - Retirement Board Member (Complete Packet)
 - Retirement Board Member –Alternate (Complete Packet)
 - CRCEA Officer (Complete Packet)
 - Invited Guests (i.e., RPEA Board Member) Complete Packet
 - Affiliate (Complete Packet with Attendee Fee marked “EXEMPT” on the Attendee Fee Line)
 - Host Committee – (Complete Packet with Attendee Fee marked “EXEMPT” on the Attendee Fee Line)
 - Speakers (Complete Packet, except the registration form)
 - Web Master (Complete Packet for the web site)
- Send a “Save the Date” post card reminding of the conference at least 6 months in advance to all the above and other interested persons.
- Request the CRCEA Secretary send an email to all association presidents and delegates to try to get an estimate of the number of members each association intends to send to the conference prior to the cutoff date required by the hotel.
- Registration materials should be sent in a 9 X 12 envelope which is prominently marked: **“IMPORTANT CONFERENCE MATERIALS”** If you are not provided with such a stamp, you may purchase one which will be reimbursed by CRCEA, and then passed on to the next conference chair.
- Collect registration forms and maintain a spreadsheet of names and addresses (Provide a copy of this spreadsheet to the CRCEA Secretary at the end of the conference)
- Make a list of all attendees, their county, title and contact information to include in each registration packet
- Forward all conference fees to the Conference Treasurer (**Note: In some instances, the Treasurer would prefer to receive the conference packets**)

and forward them to the Registration Chair. This eliminates more than one person handling the checks.)

- Obtain Registration Table Banner from the CRCEA Conference Chair
- Collect handouts and Program from the Program Chair for Goody Bags
- Include the conference survey form (**brightly colored paper**) in the packets

(Note: The conference surveys are extremely important and provide feedback to both the hosting association and to the CRCEA Conference Chairperson. These comments, suggestions and/or criticism can be very useful in improving future conferences. No one likes to make the same mistakes over and over.

To encourage attendees to submit their surveys/evaluation forms, some previous conferences have offered a drawing for gift cards to be given to one of the attendees who turn in their form.)

- Decide what to include in “Goodie Bag”, obtain funds and purchase items
- If there are a sufficient number of volunteers, some thought might be given to assigning someone as a “greeter” to meet attendees upon their arrival. This person would benefit from having attended previous conferences so that they might recognize those who have attended in the past.

3. Conference Treasurer

The host association’s treasurer will often do double duty as the conference treasurer. This arrangement works particularly well with small associations. However, it is highly recommended that the conference have a separate checking account for the conference. This makes for much easier and cleaner accounting procedures.

Since each association is aware they will be responsible to host a conference every eight years or so, and that there will be expenses involved in this endeavor, the treasurer should have set aside a line item in the budget for this necessity. By putting aside a little each year, by the eighth year, there should be much less strain on the association budget to host a conference.

The treasurer’s primary responsibility is to receive all monies for funding the conference, keep accurate records of all income and expenditures, pay all debts approved by the conference committee and solicit the CRCEA treasurer for the seed money (if the host association decides it is necessary or desired).

The treasurer will be responsible for contacting the CRCEA Conference Chair to obtain previous conference reports which will be helpful in setting up a conference budget based on their particular association’s financial situation and location. A sample budget submitted by CCCREA can be found on Page 43.

The treasurer will also be responsible for completing the Final Conference Report. A blank sample of this report can be found on Page 32, and a completed sample form can be found on Page 34.

The Final Report is due 90 days following the end of the conference.

4. Program Chairperson

In conjunction with the conference committee, the Program Chairperson will determine the subjects which will be presented at the conference, and then work with all available sources to obtain qualified speakers for each topic.

The Program Chairperson should obtain copies of previous programs from the CRCEA Conference Chair for reference and to keep from duplicating recent presentations.

The Program Chair will be working very closely with the hotel's A/V technician or the person, or volunteer the conference committee will be responsible for these duties. Someone knowledgeable of the A/V equipment used in hotels is optimal, and could mean the difference between a trouble free program and a major headache.

The Program Chair should work early to assure any A/V needs of the speakers chosen, and should begin soliciting the bios for the speaker's introduction, and any handouts they will be providing.

The Conference Committee should determine early in the planning process if they will be giving any type of honorarium. Some speakers from government agencies are not allowed to accept these types of gifts, and could cause difficulties for them.

5. Banquet / Entertainment Chairperson

(These duties could be separate)

Determine ASAP from the conference committee whether there will be a conference theme. The Banquet/Entertainment Chairperson should plan to meet early with the hotel food and beverage manager and catering staff. These people will become part of your 'family' soon, and you should develop a good working relationship with them.

Obtain a sample menu of what the hotel will most likely provide, and even though the prices may not be exactly what will be charged at the time of the conference, they should be close enough for the Treasurer to use them to prepare a budget. You will often find that a sit down dinner is more expensive than a buffet, and while the tradition has dictated a "formal" dinner, there is no reason you cannot at least consider the buffet.

As an alternative, the Conference Committee might consider having the banquet and entertainment off site. There are many convention centers, hotels, and banquet facilities who might offer a better deal than the hotel you intend to use for the conference.

This could especially be helpful if the site selection committee is considering a small, boutique hotel that can handle the rooms and training sessions, but does not have a large enough banquet facility.

There are many drawbacks which must be considered when choosing an offsite facility for any function. First, you will have to arrange for transportation to and from the site. There is also the high probability that the hotel you chose will require a minimum food and beverage purchase to get a waiver of rental fees for rooms used for training. This factor could easily offset any savings you might gain from using facilities other than the hotel.

Try to set up a date to bring the conference committee to the hotel for a sampling of what food the hotel will likely offer. Often this 'lunch' can be coordinated with a committee meeting, and the hotel will often 'comp' the meeting room as well as the food.

A decision will have to be made early as to whether there will be entertainment, and if so, what type. The cost of entertainment can be a major expense and should be included early in the budget preparations.

If a stage is needed for a band, or an area for a dance floor, all these things will have to be coordinated with the banquet and catering staff. This is also a major consideration when booking a hotel. Some hotels will have enough room for a sit down dinner with 100 guests, but they might not have the room for the stage and dance floor.

All decorations including table setup and, if applicable, centerpieces should be determined early to be included in budget considerations.

Depending on the hotel's rules regarding bringing food and drink into the hotel, the Banquet Chairperson may need to coordinate with the Hospitality Chairperson for the supply of food for the Hospitality session.

The consideration of whether to serve wine with the banquet will also be a major expense and should be decided upon early in the planning stage.

6. Door Prize Chairperson (Cross Reference Donations Chair)

If the host county plans to give out door prizes at their banquet, it is very important that someone is appointed to be in charge of this duty. The Conference Committee needs to decide early in the planning process how much they are willing to spend on door prizes, and what type.

As with the Donations Chair, the person chosen for this position should be someone with a very outgoing personality, and not be afraid to solicit gift items from someone they have never met. Many who have held this position were amazed at quality and quantity of what they received by just asking.

Many of your local agencies often provide promotional items for advertising, and are grateful for the opportunity to advertise their business. Don't forget the hotel as a possible source of door prizes. They have been known to give free lodging or dinners for the conference attendees.

While it is acceptable to solicit door prizes and donations via email or postal letter, (Two samples of solicitation letters can be found on Pages 46 and 47) it is always much better to make personal contact if possible. If it is impractical to attempt personal contact, it is recommended that the email or letter be followed up with a phone call.

Many of the previous conferences have given away gift baskets with various items donated from business in the local area. Many are replete with wine, cheeses and various other types of snacks. While these items will make a great gift, the Door Prize Chair must always keep in mind that the recipient may be traveling by train or plane and large bulky items would be difficult to transport home. This same logic also applies to gift cards from local businesses. They would be of little use to someone who lives some distance away.

Your CRCEA Conference Chair will be very willing to offer other ideas or options that have been used successfully at previous conferences.

7. Hospitality Chairperson

While the Banquet Chair has sometimes served dual roles, and been responsible for the Hospitality Room, if one of the Affiliates does not volunteer to sponsor this event, it does involve considerable planning and work.

As noted earlier in the section regarding hotel rooms, the hospitality Chair should work closely with the food and beverage manager early in the planning stage to determine where they will allow 100 people to congregate for drinks and snacks. Some hotels will not allow outside food or drink to be brought in, and this changes the entire planning process.

If an Affiliate (Steve Pettee of Pacific Group Agencies has done this for years) is allowed to bring in food and drink, the Hospitality Chair's job will be much easier. In these cases, the

hosting county will often provide a suite for the sponsor to have extra space to store the food and drink between hospitality nights.

The location for these events should be determined early in the planning process with the hotel. Although previous conferences have utilized a large suite with an adjoining bedroom for the hospitality sessions, this arrangement is far from optimum. There is not adequate space for the primary purpose of the event, and that is to be able to visit with friends and network with colleagues from other counties.

This is another area in which the CRCEA Conference Chair can assist with various options. While some have thought about holding the hospitality night and banquet at a different location than the hotel, this could affect a food and beverage minimum that the hotel requires to receive the meeting rooms for free, or at a discount.

8. Donations Chairperson

(Cross Reference Door Prize Chair)

The Conference Chairperson should appoint a person, or persons, from the association who have the talent and fortitude to solicit donations from community businesses, Affiliates, association members, and anyone else who might be able to provide monetary, or other types of donations to assist in hosting a successful conference, should be contacted.

Previous associations have had success in contacting all the CRCEA Affiliates, local business who focus on seniors, including many health plans. Some have received support from their local credit union, service/public employees union, or their retirement office.

With some preplanning (maybe a year or two in advance), local businesses have been willing to donate to the conference in return for free advertising in the association newsletter.

This is not an assignment for a timid person. Frequently letters will generate the desired effect, however more often than not, a face to face meeting, or at least a telephone call, will be required for the best results. Often you will be surprised at what will be offered if you only ask in the right way.

This aspect of early conference planning is important since it will be necessary for the treasurer to include any cost for door prizes which will not be covered by donations in the budget. Some previous associations have raised as much as \$12,000 in donations, and this will go a long way toward hosting a 'first class' conference without putting pressure on the association budget.

Additional incentive for a business or organization to support the county by donating to the conference would be by giving them credit for the various coffee breaks or other functions (they might provide breakfasts or a lunch). Previous hosting counties have had professional signs made to advertise their donor's participation.

Two samples of donation letters have been provided in the Addendums section of this manual (Refer to pages 46 and 47).

Also, do not forget the hotel as a potential donor. The hotel will often give a gift basket, a meal at the hotel, or a one night stay if the hosting association is willing to share the conference survey sheet with the hotel. The survey sheet has multiple areas regarding the hotel, and they are always anxious for feedback.

9. Spouses' Activities Chairperson

This position will only be necessary in the event that the hosting county determines that they would like to host a spouse's activity. The activities could range from a whale watching trip

(Ventura), a guided tour of a local point of interest (Sacramento), a tour of the city and harbor (Santa Barbara).

Some other ideas might include a trip to a nearby Indian Casino for the day, a bus trip to a local winery or micro-brewery, a day at the races (horses), possibly an afternoon baseball game (if in season), or a riverboat cruise (Delta areas).

These activities would have to be pre-planned so they could be added to the registration forms when they are sent out. Any cost to the attendees should be collected at this time as well.

SECTION II - CONFERENCE RESPONSIBILITIES

The CRCEA Conference Chairperson and the Host County Conference Chairperson are responsible for planning and executing scheduled conferences. The underlying assumption is that cooperation between the two Chairs will insure the success of the conference.

A. CRCEA RESPONSIBILITIES

- Coordinates with Host County to review plans, including specific conference dates.
- Assist with site selection, if requested
- Review contract prior to being signed by the host county conference chairperson
- Assists in selecting speakers.
- Provide mailing labels and other materials for mailing, including CRCEA President's Invitation Letter. *The Host County should also provide an invitation letter from their Association President.*
- Assist the host county in preparing the conference program. (See *Policy Statement on Presentation Topics and Speakers for CRCEA Conferences* – Page 23.)
- Work with the Program Chairperson to compile the information and photos needed for the program
- Contract to have the conference program printed and delivered to the host county registration chairperson
- The CRCEA Secretary will serve as the Conference Secretary.
- Disburse seed money provided to the host county toward expenses of conference upon request (This disbursement should be considered a loan to be reimbursed after the conference, unless this causes an Association hardship.)
- Arrange a meeting with the last host committee to share experiences. This meeting will normally take place at the preceding conference during the committee breakout sessions. Several other previous associations can also provide input at these meetings. Additional personalized meetings prior to the conference can be planned as needed.
- Insure that host county has CRCEA banners from the previous conference, badge holders, Goody Bags, and any other conference materials needed from CRCEA.

B. HOST COUNTY RESPONSIBILITIES

(some responsibilities have been repeated for emphasis)

- Form a Conference Planning Committee (Traditionally approx. 10 people)

(Important Note: If the scheduled host association wants to join with another association to plan a joint conference, this arrangement must be approved by the CRCEA Executive Committee. This decision must also be made no less than three years in advance, since it could affect the rotation of following associations, and could cause a certain amount of disruption in scheduled planning.)

- Request CRCEA to provide conference start-up money for establishment of a host county conference fund and initial expenses. This is a loan and is expected to be paid back to CRCEA, if possible.

- The host committee should establish needed special financial procedures. It is recommended that the conference income and expenses be held in an account separate from the operating account of the host association.
- Select a hotel at least twelve (12) months in advance of conference, and have the contract reviewed and approved by the Executive Committee prior to signing.
- Depending on the conference schedule, book at least twenty-five (25) rooms per night for the night preceding the first conference day, and twenty-five (25) rooms for each night of the two succeeding days.

The number of rooms will be dependent upon the number of attendees expected, and the location of the conference. The 25 room nights will only cover the minimum number of 20 delegates and the CRCEA Executive Committee. The host committee should attempt to determine via email contact with the other 19 counties how many each county intends to send.

- Arrange for meeting, hospitality, and banquet rooms.
- Negotiate price for the banquet and refreshments for the Hospitality hours and breaks
- Prepare invitation letter and registration form within 60 days and mail with the tentative agenda no later than 45 days prior to conference.
- The host association should invite their own members by whatever methods they deem most effective (newsletter, mailings, email, etc.), and also their local retirement board members.
- Obtain speakers (in cooperation with CRCEA Conference Chair and Executive Committee) necessary for the program agenda. (See Presentation Policy Statement in Section III, Page 23 of this Manual). Members of the local association(s) should be assigned to introduce speakers.
- Maintain accounting records of receipts and disbursements, facilitating the Final Conference Report.
- Collect registration fees: \$75.00 for each CRCEA Member Association sending a Delegate to the conference; these funds will be sent to the CRCEA Treasurer following the Conference. Collect up to \$75.00 for all other attendees (excluding Affiliates and local host county conference volunteers). This money should be designated as the host county conference income.
- Arrange entertainment at banquet, including door prizes and decorations, if appropriate.

During the conference, the hosting conference committee members should be available to provide any help or support if needed. The CRCEA Conference Chairperson can also assist with any additional needs.

Areas of greatest concern are:

- Welcoming attending members, invited guests and speakers throughout conference
- Providing any additional audio/visual equipment needs.
- Copying services, as needed.
- Helping during break periods.
- Extra assistance during lunch periods, i.e. directions to restaurants
- Social hour setup and cleanup assistance if needed

- Registration problems.

A list of all who have pre-registered for the conference, along with their contact information, shall be furnished to all registered attendees in the conference registration packet. The list will include name, contact number and email address, county represented and their designation taken from registration forms.

The host county will provide an updated list of those who actually attended the conference to the Secretary at the close of the conference. This list can be accessed by the next host county for potential invitees to their conference.

C. FINAL CONFERENCE REPORT

Following the conference, and once the host county treasurer has had sufficient time to finalize their records (no later than 90 days following the conference), the host county shall submit to the CRCEA Conference Chairperson the Final Conference Report. (See Pages 32 & 34 of this manual for a blank sample of this form and also a completed example).

This report form contains data important for planning future conferences. In addition to filling in all the blanks, please include a short narrative report evaluating your conference, including ways we might improve future conferences.

SECTION III - POLICY STATEMENT

A. PRESENTATION TOPICS/SPEAKERS FOR CRCEA CONFERENCES

Background: In past years there has been some confusion and misunderstanding regarding who has the final responsibility for selecting topics and speakers for scheduled CRCEA Spring and Fall Conferences. Is it the host committee, the CRCEA Conference Committee or the CRCEA Executive Committee (CRCEA Officers)? Traditionally, it has been a combination of all three committees working together for the common purpose of presenting an interesting and successful conference.

Nothing in this policy statement is intended to discourage the above listed committees from working together for the purpose of presenting meaningful conferences. On the contrary, this policy encourages cooperation, flexibility and input from all of the mentioned committees, including all CRCEA Associations. The intent of the policy is to provide clear direction on who is responsible, and the process used for the selection of topics and speakers for all CRCEA Conferences. Other matters relating to conference procedures and guidelines, not addressed in this manual, should be referred to the CRCEA Conference Chairperson.

Purpose of this Policy: To help minimize stress and financial impact upon local associations resulting from their participation as host for a CRCEA conference.

Objective: To insure that the majority of conference sessions contain educational information on subjects and issues which are important and relative to all CRCEA associations and members, the following are examples of acceptable subject matter:

- Topics and issues relating to county retiree pensions and medical plans
- County retiree healthcare programs and activities
- Benefit issues for retired county employees
- Education topics relating to retired county employees or seniors in general
- State and federal legislation related to retired county employees
- Topics relating to county retirement systems
- Topics relating to CRCEA Associations, including legal actions to protect benefits
- Topics relating to fund investments and actuarial issues
- Issues regarding pension reform, both state and federal
- Topics with local community interest, including points of interest, museums, etc.
- Topics of current newsworthiness
- Safety and health issues for seniors

Responsibility for the selection of session topics and presenters

The Conference Host Committee is responsible for the Opening Ceremonies (presentation of colors, flag salute, invocation, etc.), and the selection of the speaker or dignitary for the Welcoming Address and Key Note Address.

The CRCEA Executive Committee (CRCEA Officers) will be advised of the program selection for all other session topics via the CRCEA Conference Chairperson.

Session topics suggestions and input are sought from host committee, the ExCom, CRCEA Conference Committee, association delegates and members. While the hosting committee has the responsibility for the selection of conference topic, input from the CRCEA Executive Committee should be solicited prior to making final decision on the program format. (All

suggestions must comply with the Policy Statement on Presentations and Speakers on Page 23 of this Manual.)

Coordination of Suggestions and Input

Coordination of suggestions and input relative to session topics and presenters is the responsibility of the hosting county and the CRCEA Conference Committee. Association members who have suggestions regarding conference topics will direct their suggestions to the hosting county conference chairperson or the CRCEA Conference Committee Chairperson. Any suggestions received by the Conference Committee Chairperson will be forwarded to the hosting conference committee for consideration.

Timing for Suggestions and Input on Session Topics

The CRCEA Executive Committee recommends that conference session topics and presenters be confirmed as early as practical (3 to 4 months prior to the scheduled conference if possible). Accordingly, suggestions and input from CRCEA association members are asked to submit their suggestions 3 to 4 weeks after the preceding conference, or at least 3 months prior to the upcoming conference. **(Note: The prior conference evaluation form is an excellent place to recommend speakers for the next conference. These forms are maintained by the CRCEA Secretary.)**

It is important to note that the CRCEA Conference Chairperson will need the final decision on the speaker's schedule no less than four weeks prior to the conference. This is the minimal amount of time necessary to coordinate with the printer so that the conference program can be provided in a timely manner.

B. CONFERENCE FUNDING

Background: CRCEA member associations are expected to host a CRCEA Conference according to a rotation schedule established by the Delegates. This Hosting activity occurs approximately every eight years, but may vary depending on whether some counties decide to join another county to co-sponsor their event. Hosting a conference requires that the host association begin planning for initial expenditures several years before the Conference actually takes place. CRCEA recognizes that most member associations may not have sufficient funds in their local treasuries to take on the added expenses of Conference hosting, and have made the offer of seed money available for hotel deposits and other early expenses.

HOST ASSOCIATION RESPONSIBILITY

- The host association should provide a written request for the start-up (seed) money to the CRCEA treasurer when they are ready to establish a conference fund (usually at the time of signing, the hotel contract often requires a deposit).
- The host association should provide a budget outlining their expected expenses and income for the conference to the CRCEA Conference Chairperson, at least six months in advance, as one of their first steps in the planning process. (See page 43 for a sample of a completed budget.)
- As part of their hosting duties, it is the responsibility of the host association to attempt to raise funds to defray the conference costs through solicitation of contributions from companies that do business with the retirees, or provide services to retirees in their areas. Individual association members, who are not able to participate in other ways, are often willing to make monetary donations. Special fund-raising activities, e.g., See's Candy sales, are also a good source of conference funding. However, this type of

funding needs preplanning due to the time it would take to raise any significant amount of money.

It is recommended that associations plan for a line item in their budgets to save as much as possible each year that is earmarked specifically for conference expenses. The suggested amount for this purpose would be \$1,000 annually, if possible.

- Any requests to CRCEA for additional funding should be made to the CRCEA treasurer, and accompanied by receipts or other documentation to verify each expense request at the end of the event. The Executive Committee will review and approve as appropriate.
- The seed money provided by CRCEA should be considered a loan, and in the event the conference realizes a profit at the final accounting, part or all of the money advanced by CRCEA should be returned to the CRCEA treasurer.
- The fact that there was an expense to the Association for hosting the conference does not qualify as a loss. A certain monetary contribution by the Association is expected.

CRCEA RESPONSIBILITY

- Provide seed/start-up funds, upon request, with which the host association can establish a Conference Fund, separate from their association funds. These funds will be shown as income in the final report. During the conference planning period, CRCEA will provide assistance to the host association by reviewing their proposed hotel contract, conference budget, pointing out where costs can be trimmed and providing advice on minimizing expenses.
- CRCEA will provide assistance with program planning, speaker acquisition, and the printing of the actual program for distribution in the registration packet.
- CRCEA will provide appropriate banners, “Goodie Bags”, name tag holders, and a name tag program for printing name tags.

SECTION IV - AFFILIATES AND/OR CONTRIBUTORS

The pressure on Affiliates to market their product requires guidelines that will enable the Affiliate Chairperson, and host county Conference Chairperson, to deal with situations without having to assume a personal responsibility. The following are guidelines which should provide fair exposure to the Affiliates without causing the membership to feel they are constantly being given a sales pitch. In the event of any question regarding the application of these guidelines, the host county Conference Chairperson will contact the CRCEA Conference Chairperson for clarification.

The following guidelines have been adopted by the Executive Committee to be a part of this Conference Manual.

A. DEFINITIONS

AFFILIATE:

A company whose application for membership as an Affiliate has been approved, and has paid the annual fee, is considered an Affiliate.

CONTRIBUTOR:

A company or individual who contributes to CRCEA, for example:

- Sponsoring a Conference activity, such as a meal or coffee break.
- Providing a contribution to help defray costs of a conference.
- Providing promotional items for conference packets (“Goodie Bags”).
- Sponsoring a non-conference activity (use of facility for meetings), or an outing for members and spouses.

B. BENEFITS

AFFILIATE:

- Company name is listed on CRCEA letterhead and the CRCEA web site.
- Company name is listed in CRCEA conference program booklet.
- Receives a CRCEA roster.
- Company representative is provided time on conference agendas to introduce themselves and give a brief explanation of company services.
- Signs will be posted at CRCEA conference crediting Affiliate during the activity they are sponsoring.

CONTRIBUTOR:

- Company or individual name listed in CRCEA conference program booklet.
- Signs will be posted at conference crediting the contributor for the activity they are sponsoring.

C. PRIVILEGES

AFFILIATE:

- May be given preference on providing for a particular portion of a conference (such as Hospitality Hour) at the discretion of the Executive Committee.

- May display promotional materials during conferences, if accommodations can be made by the host committee (table, wall space, etc.)
- May contribute to expenses of conferences and/or provide materials for attendee packets (Goodie Bags). May be asked to participate in conference program by sitting on discussion panels, or making a presentation on a specified subject.
- May attend all conference programs with no registration fee. (Costs for meals, lodging, etc. are the responsibility of the Affiliate and will not be paid by CRCEA).
- Will be introduced at some convenient time during each conference.
- Solicitation of conference attendees for marketing a company's services or products shall be done with discretion.

CONTRIBUTOR

- May display promotional materials during conferences, but restricted to time and place of activity for which they have contributed. Preference for limited space will be given to Affiliates. If a Contributor makes a donation of money which is not applied to a specific activity, material displays will be determined by the host committee and/or the Executive Committee.

D. LIMITATIONS

These rights and privileges **DO NOT INCLUDE**:

- Use of the CRCEA Roster as a mailing list to directly sell a company's product.
- Sale or releasing of the CRCEA Roster to any other company/organization.
- Using a CRCEA conference presentation to sell or promote a company's individual product(s).

E. CONFERENCES

It is important that a distinction is maintained between Affiliates and Contributors, and that it is reflected in the Program Booklet.

- The list of Affiliates shall be reviewed by the Affiliate Chair or Treasurer prior to printing to ensure accuracy as to content and that dues are current.
- Affiliates may be listed on next to last page of booklet.
- Contributors should be listed separately and their contribution acknowledged in the conference program.

F. THE WEBSITE

Affiliates will be invited to submit a promotional feature that will run continuously until revised.

G. GENERAL

Affiliates and Contributors are permitted to discuss their products or services with CRCEA members during the conference, **using discretion and only with the cooperation and approval of the member.**

SECTION V - SAMPLE FORMS

| | | |
|------------------|---|---------|
| CRCEA Form # 1: | Conference Timeline | Page 29 |
| CRCEA Form # 2: | Conference Registration Form | Page 31 |
| CRCEA Form # 3: | Final Conference Report Form | Page 32 |
| CRCEA Form # 4: | Explanation of Terms | Page 33 |
| CRCEA Form # 5: | Sample of Completed Final Conference Report | Page 34 |
| CRCEA Form # 6: | Sample Conference Name Badge (Instructions) | Page 35 |
| CRCEA Form # 7: | Additional Samples of Conference Name Badge | Page 36 |
| CRCEA Form # 8: | Sample Host County Conference Invitational Letter | Page 37 |
| CRCEA Form # 9: | Sample of CRCEA President Invitational Letter | Page 38 |
| CRCEA Form # 10: | Sample CRCEA President Welcome Letter | Page 39 |
| CRCEA Form # 11: | Conference Survey Form | Page 40 |
| CRCEA Form # 12: | Conference Program Agenda (Sample) | Page 41 |
| CRCEA Form # 13: | Explanation of Conference Budget | Page 44 |
| CRCEA Form # 14: | Sample of Completed Conference Budget | Page 45 |
| CRCEA Form # 15: | Solicitation Letter-1 | Page 46 |
| CRCEA Form # 16: | Solicitation Letter-2 | Page 47 |
| CRCEA Form # 17: | Conference Rotation Schedule | Page 48 |
| CRCEA Form # 18: | Audio/Visual Equipment Price Guide (Sample from 2016) | Page 49 |
| CRCEA Form # 19: | Acronym Definitions | Page 50 |

CRCEA CONFERENCE TIMELINE

(Name) County Hosted Conference (Date)

| Topic | Comments | Dates | Status |
|---|---|--------------|---------------|
| Read CRCEA Conference Manual | Submit questions to the CRCEA Conference Chair | | |
| Site (Hotel) Selection – Try to consider attendee transportation needs, i.e., air, rail, parking costs. | 12-36 months before conference Provide tentative contract for CRCEA Conference Chair review | | |
| Does Hotel offer a shuttle service for arriving guests | Try to get a discount on parking charges if necessary. | | |
| Does room rate include breakfast, WiFi, etc. | If not, try to get a discount for hotel guests. | | |
| Determine if hotel will allow food and drink to be brought in from outside | If yes, contact Affiliate to request sponsorship of Hospitality Room (usually Steve Pettee – PGA) | | |
| Audio/Visual Equipment | Determine if outside vendors or members can provide any/all A/V equipment | | |
| Send Copy of Tentative Hotel Contract to CRCEA Conference Chair to Review | CRCEA Ex Com approval is needed prior to signing final contract. | | |
| Obtain Start-up Funds from CRCEA (\$2,000 Maximum) | Prepare letter & solicit funds from CRCEA treasurer – Can be used as deposit for hotel | | |
| Select Treasurer and Open Bank Account | Income & disbursement records must be maintained separate from regular Association funds | | |
| Decide on a Conference Budget | Use Template in the Conference Manual | | |
| Committee Assignments – Refer to Conference Manual for necessary positions | Meeting on (DATE) to decide committee assignments/chairs. Invite CRCEA Conference Chair. | | |
| Select Donation Chairperson - requires someone with a lot of 'intestinal fortitude'. | This is a crucial position, and some counties have received \$12,000 in donations. | | |
| Locate CRCEA Banners and Name Tag Holders | Should have been provided at the end of the previous conference | | |
| Determine if a conference theme will be used | Decide on Theme to incorporate with conference program | | |

| | | | |
|---|--|--|--|
| Conference Info Flyer | Also included in the conference packets for the next CRCEA Conference prior to yours | | |
| Entertainment (if any) | Determine the entertainment for the event & book it. Determine if a dance floor is needed. | | |
| Determine Banquet Menu (or other options can be discussed) | Often exact prices will not be available until six months before the conference | | |
| Determine what will be served during the breaks, besides coffee, tea & water. | Decide if this is a Banquet Chair responsibility, or do you want it to be a different individual in charge | | |
| Provide CRCEA Conference Chair with Speaker and Donor list for Program | Locate five to six photos to be used in Program. Local interest themes | | |
| Speakers – Start soliciting bios and determining needs early | Power Point presentations go over well, and handout material is very helpful | | |
| Notify Association Members of the Conference | At luncheons, in the newsletter, on the website, etc. | | |
| Use above notices to solicit volunteers | Help with the Registration Desk and Banquet is most important | | |
| Solicit promotional items for the Goody Bags | Local businesses, labor unions, credit unions, medical facilities, etc. are some good sources | | |
| Obtain mailing list from CRCEA Secretary | Mailing list needed that includes all delegates/alternates, retiree trustees, previous attendees, etc. | | |
| Request CRCEA Secretary send copy of flyer via email for “Save The Date notice” | This notice should go out approx. 90 days after last conference and 30 days prior to Reg. Packets | | |
| Invitation/Registration Packets including registration form | 60-45 days before the conference date. Obtain mailing list from CRCEA; determine other invitees. | | |
| Make Signs For Conference. Sponsors, donors, and directional | ‘Fast Signs’ is an excellent company for this purpose and is statewide | | |
| Provide CRCEA Conference Chair with final corrections for the program | Address for person receiving the programs is also needed. | | |

CONFERENCE REGISTRATION FORM

NAME/S/ _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____

TEL.NO. _____ Email _____

EMERGENCY CONTACT: _____
(Name and Phone Number)

AFFILIATE OR ASSOCIATION NAME _____

DEADLINE FOR HOTEL RESERVATION IS _____

CALL HOTEL DIRECT TO MAKE RESERVATIONS (Phone number) _____

Tell us what designation you wish on your name badge:

Delegate ___ Alt Delegate ___ Retirement Board Member ___ Ret. Board Member Alt ___

Member ___ Guest ___ Affiliate ___ CRCEA Officer (Indicate Title) _____

CONFERENCE ASSOCIATION FEE \$75.00 (Include on Delegate Reg. form only) \$ _____

ATTENDEE FEE OF \$75.00 _____ Each \$ _____

(To be paid by every CRCEA member, except Affiliates and Host Conference Volunteers)

SPOUSE/SIGNIFICANT OTHER NOT ATTENDING MEETINGS \$35.00 \$ _____

BANQUET REGISTRATION FORM

MEAT – QTY _____ @ \$ _____ Each \$ _____

CHICKEN – QTY _____ @ \$ _____ Each \$ _____

FISH – QTY _____ @ \$ _____ Each \$ _____

VEGETARIAN – QTY _____ @ \$ _____ Each \$ _____

TOTAL AMOUNT ENCLOSED \$ _____

(Association fees (if applicable), Banquet, Attendee fees)

COMPLETE THIS FORM AND MAIL TO:

(Name) (Address) (City) (State) (Zip) (Phone)

MAKE CHECK PAYABLE TO: _____

Note: This Registration Form is in a WORD format for easy editing. The host county may add, delete or adjust any specific information to this form (i.e. time of conference, dates, name of hotel including city and any other information it believes will help in registering conference attendees.

FINAL CONFERENCE REPORT

_____ County
 Explanations of items below are on page ##

INCOME

| ITEM | AMOUNT | COMMENTS |
|----------------------------|--------|----------|
| Association Fees (\$75.00) | | |
| Banquet Fees | | |
| CRCEA Contribution | | |
| Refund of Deposits | | |
| Attendee's Fees (\$75.00) | | |
| Other Contributions | | |
| TOTAL | | |

EXPENSES

| ITEM | AMOUNT | COMMENTS |
|------------------------------------|--------|--------------------------------------|
| No. of Hotel Rooms Booked | | Sun: ___ Mon: ___ Tues: ___ |
| Deposits | | |
| Banquet | | |
| Coffee Breaks | | |
| Entertainment | | |
| Room Rental | | |
| Equipment Rental | | Audio – Visual |
| Hospitality Costs | | |
| Office Expense | | |
| Decorations | | |
| Certificates | | |
| Association fees remitted to CRCEA | | Equal to \$75.00 fee per Association |
| Reimburse CRCEA Contribution | | Reimburses CRCEA for Seed Money |
| Continental Breakfasts | | |
| Other | | |
| TOTAL | | |

STATISTICS

| ITEM | NUMBER | COMMENTS |
|-------------------------------|--------|----------|
| Total Registrations | | |
| Delegate | | |
| Present | | |
| \$35 paying attendees present | | |
| At Sessions | | |
| At Socials | | |
| At Coffee Breaks | | |
| At Banquet | | |

Note: Do not make changes to above form.
 Attach additional sheets to extend comments on items above & for other problems or suggestions

EXPLANATION OF TERMS FOR FINAL REPORT

INCOME

- Association Fees \$75: Total of all registration fees sent in by each Association
- Banquet Fees: Total of all fees received for Banquet
- CRCEA Funding: CRCEA's contribution to Host County – Currently up to \$2,000.00
- Refund of Deposits: Total of any fees refunded to Host County
- Other Contributions: Total of all funds received from Contributors
- Attendee Fees @ \$75: Total of registration fees received from attendees and spouses

EXPENSES

- Hotel: Total number of rooms booked Sunday, Monday & Tuesday
- Deposits: Any deposits required by Hotel or other Agency
- Banquet: Total amount paid to Hotel for the Banquet
- Coffee Breaks: Total amount paid for all coffee breaks, including food
- Room Rental: Total amount paid for rental of all conference rooms
- Equipment Rental: Total amount paid for equipment (i.e. audio-visual)
- Hospitality Costs: Total costs of food and beverages
- Office Expense: Total costs of copying, printing, mailings etc.
- Decorations: Total costs of table center pieces or other decorations
- Certificates: Total costs of any certificates or honorarium for speakers
- Association Fees: Total of all Association registration fees remitted to CRCEA
- Entertainment: Total of all fees paid for entertainment
- CRCEA Repayment: Return of seed money to CRCEA

STATISTICS

- Total Registrations: Number of persons registered for Conference
- Number of Delegates: Delegates only, not Alternates
- Number of Attendees: Number of paying attendees at \$75
- Number at Sessions: Estimated number of persons who attended each training session
- Number at Social: Estimated number of persons at socials functions
- Coffee Breaks: Estimated number of persons who attended each coffee break
- Banquet: Total number of persons attending the banquet

The above explanations are intended to help the host county complete this conference report which will be helpful to future host counties. List any problem areas and how you resolved them on attached sheets.

Thank you for your cooperation

SAMPLE OF COMPLETED CONFERENCE FORM

| CRCEA HOST COUNTY FINAL CONFERENCE REPORT | | |
|---|--------------------|--|
| XXXXXXXXXX COUNTY | | |
| INCOME | | |
| ITEM | AMOUNT | COMMENTS |
| Association fees (\$75) | 1,475.00 | Fees Paid To CRCEA On 10/19/2016 Via Check (No. 1006) |
| Banquet fees | 3,800.00 | 76 Attendees (@\$50.00) |
| CRCEA Start Up Contribution | 1,000.00 | Contribution Reimbursed to CRCEA on 10/19/2016 via check |
| Association Contribution | 8,000.00 | Contributed \$1,000 Per Year For Past 8 Years (Budget Item) |
| Attendees fees (\$75) | 5,700.00 | 76 Reg. Attendees, 8 One Day Attendees, and 6 Affiliates |
| Other contributions | 8,000.00 | Major sponsors (3 X \$2,000 and 2 X \$1,000) |
| TOTAL | \$27,975.00 | |
| EXPENSES | | |
| ITEM | AMOUNT | COMMENTS |
| Number of hotel rooms booked | | Sun: 30 ; Mon: 38 ; Tue: 38 |
| Registration Cancellation Refunds | \$280.00 | Includes Misc. Overpayment Errors |
| Door Prizes | 891.00 | |
| Banquet | 4,661.00 | 76 Dinners Served - Includes 31.5% Service Charge and Tax |
| Wine For Banquet | 301.00 | Wine Discounted By 25% Due To Hotel Error |
| Monday Italian Buffet Lunch | 2,952.00 | Includes 31.5% Service Charge and Tax |
| Coffee Breaks | 3,172.00 | Includes 31.5% Service Charge and Tax |
| Entertainment | 2,187.00 | Includes Band Member Dinners |
| Room rental | 0.00 | Comped By Hotel |
| Equipment/AV Rental Expense | 708.00 | Provided By Joe McKee (RPESJC) - Hotel Screen Rental |
| Hospitality costs | 1,761.00 | Monday/Tuesday Evening |
| Office expense | 214.00 | Includes Envelopes, Printing, and Postage |
| Banquet Decorations | 249.00 | |
| Parking Stickers | 190.00 | Comped Parking For Speakers, Volunteers, Color Guard, etc. |
| Association fees remitted to CRCEA | 2,475.00 | Includes \$1,000 Seed Money - Check No. 1006 |
| Continental Breakfasts (Fresh Fruit) | 526.00 | Includes 31.5% Service Charge and Tax |
| Other (Extra Tips) | 280.00 | |
| TOTAL | \$20,567.00 | |
| NET SURPLUS/(DEFICIT) - total income; less total expenses | \$7,408.00 | Since the Association prefunded \$8,000, this is not considered a profit or a loss. This amount will be returned to the conference fund for the next conference. |
| STATISTICS | | |
| ITEM | NUMBER | COMMENTS |
| Total registrations | 90 | 76 Regular, 8 One Day Registrants, and 6 Affiliates |
| Delegates | 19 | |
| Present | 19 | |
| \$45 paying attendees present | 76 | |
| At sessions | | Not Counted |
| At socials | 80 | |
| At coffee breaks | | Not Counted |
| At banquet | 76 | |
| By, _____ | date | |

CONFERENCE NAME BADGE

Name Badges – Name badge holders are provided by CRCEA. The badge inserts (which can be color-coded for each group as an option) are placed in each holder, and then put into each registration packet/goodie bag.

The Attendees name should be in **LARGE PRINT**. They shall have one of the following registration designations:

1. Delegate
2. Alternate Delegate
3. Retirement Board Member
4. Retirement Board Member Alternate
5. Member (Any retired employee attending the conference)
6. Guest (such as spouses)
7. Affiliate – Name of Firm
8. CRCEA Officer with Title (i.e. President, Vice President, etc.)
9. Host Committee Member

SAMPLE NAME BADGE

| | |
|--|---|
|  | <p>CRCEA (Spring or Fall) CONFERENCE (Dates of Conference) (City Conference is Being Held)</p> |
| <p>NAME OF ATTENDEE</p> <p>County Name and ACRONYM</p> <p>DESIGNATION: (Delegate, Guest, Alternate, etc.)</p> | |

(Note: Logo on Badge does not have to be CRCEA logo; it can be any logo host county desires)

MORE SAMPLE NAME BADGES



**October 17-19, 2016
CRCEA Fall Conference**

VIRGINIA ADAMS
San Bernardino County (RESBC)
CRCEA Secretary
CRCEA Communications Committee Chair
Hosted by CCREA, Contra Costa County



April 20 – 22 2015

Conference

CRCEA Spring

VIRGINIA ADAMS
San Bernardino County (RESBC)
Editor, *The Intercom*
CRCEA Communications Committee Chair
Hosted by RESBC, San Bernardino County

CRCEA CONFERENCE INVITATIONAL LETTER

(Use your own Association letterhead, if possible)

CRCEA (Date) SPRING/FALL CONFERENCE

Date

Place

To all CRCEA Delegates, Alternates, County Association Members, Affiliates, Retirement Board Members, Spouses, and Guests:

The (name of local association) cordially invites you to attend the CRCEA (Spring/Fall 20XX) Conference to be held (m/d/y) at:

Hotel Name
Hotel Address
Hotel Phone
Hotel Web Site

Enclosed are registration forms to assist you in registering to attend the CRCEA (Spring/Fall 20XX) Conference. Please complete a registration form for each attendee, including spouse and/or guest. Your completed registration form(s) and check must be received by (DATE). The check should include \$75 for each attendee (excluding Affiliates), and \$ XX for each banquet reservation.

Hotel reservations are to be made directly with the hotel before (Date). Please note the room rate is \$ XX plus XX% tax for a total of \$ XX. The hotel has a restaurant on site and free parking (if applicable or list special rate) When making reservations be sure to mention you are with CRCEA (or other designation used for identification of the conference) to receive the conference room rate.

Any questions regarding conference registration should be referred to:
(Name), Conference Chair, at (Telephone Number and Email Address).

We look forward to seeing you at the conference.

Sincerely,

(Name), Conference Chair

Delegates Only: Please bring 25 copies of your association newsletter for placement on the information table.

SEE ENCLOSED MAP FOR HOTEL DIRECTIONS

SAMPLE OF PRESIDENT'S INVITATIONAL LETTER

California Retired County Employees Association

Representing Over 180,000 California County Retirees

August 1, 2016

CRCEA Delegates, Members, Affiliates and Friends of County Retirees,
'37 ACT Retirement Board Members and Administrators:

Please accept this invitation to join your fellow retirees at our Annual CRCEA Fall Conference that will be held on **October 17-19, 2016** in beautiful Contra Costa County, California, hosted by the Contra Costa County Retired Employees Association (CCCREA), and held at the **Embassy Suites in Walnut Creek**.

Traveling to Contra Costa County will give you the opportunity to visit another of California's beautiful and historic counties. With its hi-tech areas, parks and history, along with wonderful restaurants and upscale shopping, CCCREA encourages you to join them for this conference.

CRCEA continues to work to provide you with current educational information relative to our present and future county retiree issues. To this end, Contra Costa Host Conference Committee's spotlight will be on the keynote speaker, California State Treasurer, John Chiang. He will talk about California's "Secure Choice" retirement program.

The past several conferences included Round Table Discussion, highlighting information and issues from various member associations, which were very well received, thus, the Executive Committee has continued to allot time for individual associations to present informational materials on local problem areas, requests for assistance, along **with** successful accomplishments that may be helpful to other associations .

With the legislative year in Sacramento winding down, time has been planned for our Legislation Session. We will bring together CRCEA legislative consultant Amy Brown and other 'experts' from the Sacramento scene to be with us. Their analysis is always interesting and should provide insight into the future.

Included with this letter, you will be receiving the Tentative Program giving you an idea of the topics and great speakers we will be enjoying at the Conference. Our hosts are also providing entertainment and gifts guaranteed to make the Tuesday evening social event relaxing, fun and rewarding.

The Wednesday Morning Business Session is an important segment, with discussion from local associations as well as updates from all our Standing Committees. We will consider other business brought before the Delegates, who are the Board of Directors and the official voting body for CRCEA; not the least of which is the election of officers for the next term. It is important that every association be represented at the Conference, not only for the valuable information, but especially at the Business Session.

You are always welcome to bring members of your family and friends to the Conference. Plan now to attend. Encourage your Retirement Board Retiree Member (and Alternate) to join us. We look forward to seeing you in Contra Costa County.

Sincerely,

E. F. "Skip" Murphy, President

CRCEA Office, P.O. Box 310756, Fontana, CA 92331
Phone: 909-790-7199 lvyva@msn.com

NOTE: President's Invitation Letter will be printed on CRCEA letterhead paper

California Retired County Employees Association

Representing Over 180,000 California County Retirees

OFFICERS

E. F. (Skip) Murphy,
President

Michael Sloan, Vice
President

Carlos Gonzalez, *Treasurer*

Virginia Adams, *Secretary*

William (Bill) de la Garza,
Past Pres

MEMBER ASSOCIATIONS

Alameda
Contra Costa
Fresno
Imperial
Kern
Los Angeles
Marin
Mendocino
Merced
Orange
Sacramento
San Bernardino
San Diego
San Joaquin
San Mateo
Santa Barbara
Sonoma
Stanislaus
Tulare
Ventura

AFFILIATE MEMBERS

Cheiron, Inc.
Guided Choice
Liberty Mutual
Member Extra, Inc.
My Senior Health Plan
Pacific Group Agencies, Inc
Road Scholar
Southland Credit Union
Segal Consulting
Western Group Agencies, Inc.

A 501(c)4 Association

Date

CRCEA Delegates, Affiliates and Conference Attendees:

Welcome to the _____ Conference of CRCEA. The host county representatives from _____ have been planning this event for well over a year and have a terrific few days ready to go.

As expected, there will be sessions of serious importance, there will be sessions of general interest, and there will be interactive sessions to give and receive ideas that will hopefully help your local association.

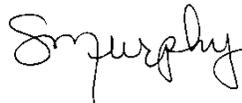
But our time together will not be just business. There will be time to see and visit _____ County's historic area, attractions, governmental areas, as well as the wonderful restaurants.

_____ has planned a great Tuesday evening dinner and entertainment, along with prizes galore. It's a perfect opportunity to socialize, network and relax with your peers and friends.

With serious business and general information on our agenda, I anticipate a conference that will not put anyone to sleep. However, we must ensure that all items get handled, so I will keep the agenda going and, along with the host committee, to ensure that the _____ Conference will be what each of you expected it to be.

On behalf of all the CRCEA Officers, I welcome you to _____ County.

Fraternally,



E. F. "Skip" Murphy, President

SAMPLE CONFERENCE SURVEY SHEET

20XX (Spring/Fall) Conference – (Name of Host County)

In an effort to provide you with the best possible CRCEA conferences, please fill out this form and give to CRCEA Secretary (Name) before leaving. We would appreciate your thoughts and opinions so that we can better assist future host counties in planning their conferences.

Your Name (Optional) _____ Delegate Yes _____ No _____

E-mail Address _____

SUBJECTS: Excellent _____ Interesting/timely _____ Too technical _____ Boring _____

Comments: _____

WHAT NEW SUBJECTS WOULD YOU RECOMMEND? _____

HOTEL MEETING FACILITIES: Excellent _____ Good _____ Adequate _____ Poor _____

Comments: _____

HOTEL FOOD FACILITIES: Excellent _____ Good _____ Adequate _____ Poor _____

Comments: _____

HOTEL ROOM ACCOMMODATIONS: Excellent _____ Good _____ Adequate _____ Poor _____

Comments: _____

HOTEL SERVICE: Excellent _____ Good _____ Adequate _____ Poor _____

Comments: _____

CONFERENCE ORGANIZATION: Excellent _____ Good _____ Adequate _____ Poor _____

Comments: _____

Your Additional Comments on any part of the Conference: _____

SAMPLE PROGRAM AGENDA
CRCEA (Spring or Fall) (Year) CONFERENCE
(April or October and dates)

Tentative Program

MONDAY, (date)

- 9:00 a.m. – 4:30 p.m. **Registration: (location)**
- 1:00 p.m. – 1:30 p.m. **Opening Session: (location)**
Call to Order: CRCEA President
Invocation: (Name)
Presentation of Colors: (Name of group)
National Anthem: (Name of singer)
Pledge of Allegiance: (Name of leader)
Roll Call of Counties: CRCEA Secretary
Introduction of *first time* Attendees – CRCEA President
- 1:30 p.m. – 1:45 p.m. **Welcome**
Speaker: (Name, title)
Name of person making introduction:
- 1:45 p.m. - 2:30 p.m. **Keynote Address (Title)**
Speaker: (Name, title, company/organization)
Name of person making introduction:
- 2:30 p.m. – 3:15 p.m. **Presentation: (Title)**
Speaker: (Name, title, company/organization)
Name of person making introduction:
- 3:15p.m. – 3:30 p.m. Afternoon Break
- 3:30 p.m. – 4:10 p.m. **Presentation (Title)**
Speaker: (Name, title, company/organization)
Name of person making introduction:
- 4:10 p.m. – 5:00 p.m. **Breakout Sessions:** If you are not assigned to a Committee, please join any
Committee you like.
- 5:30 p.m. – 7:00 p.m. **Hospitality Reception – All Attendees and Affiliate
Members are Invited – (location)**
Hosted by Steve Pettee, Pacific Group Agencies
- 7:00 p.m. **Dinner – on your own**

TUESDAY, (date)

| | |
|-------------------------|--|
| 6:00 a.m. – 8:30 a.m. | Breakfast (location) |
| 8:00 a.m. – 2:00 p.m. | Registration (location) |
| 8:15 a.m. | Morning General Session: (location) Call to Order: CRCEA President Announcements: (Name) |
| 8:30 a.m. – 9:30 a.m. | Presentation: (Title) Speaker: (Name, title, company/organization) Name of person making introduction |
| 9:30 a.m. – 10:15 a.m. | Presentation: Speaker: (Name, title, company/organization) Name of person making introduction |
| 10:15 a.m. – 10:30 a.m. | Morning Break |
| 10:30 a.m. – 11:15 a.m. | Introduction of Affiliates – Affiliate Committee Chair |
| 11:15 a.m. – 12:00 p.m. | Presentation (Title) Speaker: (Name, title, company/organization) Introduction: (Name of person making introduction) |
| 12:00 p.m. – 1:30 p.m. | Lunch – On Your Own |
| 1:30 p.m. – 2:30 p.m. | Round Table Session – Skip Murphy Speakers: (Names, if necessary will be provided by CRCEA) |
| 2:30 p.m. – 2:45 p.m. | Afternoon Break |
| 2:45 p.m. – 3:30 p.m. | Legislative Report – Legislative Committee Chair Panel: (Names and titles will be provided by CRCEA) |
| 3:30 p.m. – 4:30 p.m. | Presentation (Title) Speaker: (Name, title, company/organization) Introduction (Name of person making introduction) |
| 5:30 p.m. – 7:00 p.m. | Hospitality Reception – All attendees and Affiliate Members are invited (location) Hosted by (Steve Pettee, Pacific Group Agencies or other) |
| 7:00 p.m. – 9:30 p.m. | Conference Banquet (location) Master of Ceremonies (Name) Entertainment: (Name(s)) Door Prize Drawing |

WEDNESDAY, April 28

6:00 a.m. – 8:00 a.m.

Breakfast Buffet (location)

8:00 a.m. – 11:00 a.m.

Business Session (location)

Call to Order: CRCEA President

Announcements: (Name)

Approval of Fall Conference Minutes: (CRCEA Secretary)

Executive Committee Report (CRCEA President)

Financial Report: (CRCEA Treasurer)

Committee Reports by CRCEA Committee Chairs

Affiliate: (Name, County)

Benefits: (Name, County)

Bylaws: (Name, County)

Communications: (Name, County)

Audit/Finance: (Name: County)

Legislation: (Name, County)

Membership: (Name, County)

Nominating: (Name, County)

Conference: (Name, County)

Invitation to the next (spring/fall) 20XX Conference (Name,County)

Closing Remarks: CRCEA President

CONFERENCE BUDGET EXPLANATION

INCOME

Association Fees (20 @ \$75.00) [*One Association Fee per Association to be remitted to CRCEA*]

Banquet Fees (*Number of attendees registering times amount being charged for banquet*)

CRCEA Contribution (*\$1,000.00 or amount agreed upon by the Executive Committee*)

Host Association Advance (if any)

Host Association Contributions (*from member donors/money-raising activities*)

Registration Fees (*Number of attendees times Registration Fee of \$75.00*)

Other Contributions (*Contributions from businesses/organizations*)

TOTAL INCOME

EXPENSES

REGISTRATION

Printing Envelopes

Postage to Mail Packets

Name Tags

Items for Goodie Bags

SESSIONS

Meeting Room Rental

Audio-Visual and/or any other Equipment Rental

Independent Contract Fees for A/V Service (*if used*)

Breaks -Soft Drinks/Water/Coffee (*Monday PM, Tuesday AM, Tuesday PM, Wednesday AM coffee*)

Sponsor Signs

HOSPITALITY AND BANQUET

Room Rental

Food/Drinks

Room Rental

Decorations

Banquet Meal (*and wine, if desired*)

Entertainment

A/V Needs

Prizes

FINANCIAL

Refunds - Registration cancellations/ Refunds made by the host association.

CRCEA - Repay advance seed money

CRCEA - Association Fees - 20 times \$75.00 – remitted to CRCEA after the Conference

OTHER EXPENSES

Miscellaneous Office Supplies

Other

TOTAL EXPENSES

These headings reflect the typical income and expense items encountered in hosting a conference. Fees should be based on about 100-120 attendee registrations. Actual expense figures vary from County to County. Hotel costs vary from hotel to hotel. Some research will have to be done to ascertain typical costs in each host county area when preparing a preliminary budget. It can then be adjusted when actual costs are confirmed.

CRCEA FALL CONFERENCE - WALNUT CREEK 2016

*CRCEA Form # 14
Sample of Completed
Conference Budget*

PROPOSED BUDGET VERSUS ACTUAL

10/16 - 18/2016

| INCOME | BUDGET | ACTUAL (To Date - 08/16/2016) | NOTES |
|-----------------------|-----------------------------------|--|---|
| | Hotel Deposit \$ 1,000 | \$ 1,000 | From CCCREA - Paid Hotel on 04/14 |
| | Association Fees \$ 1,500 | \$ 1,125 | Pay to CRCEA at end of conference |
| | Banquet Fees \$ 5,000 | \$ 3,400.00 | Assumes meal charge of \$50 each x 100 people |
| | CRCEA Advance \$ 1,000 | \$ 1,000 | Received |
| | CCCREA Advance \$ 8,000 | \$ 8,000 | Received |
| | Daily Attendance Fees \$ 200 | \$ 95 | Five One Day - One Lunch |
| | Registration Fees \$ 4,500 | \$ 3,105 | \$45 each attendees |
| | Contributions/ Donations \$ 8,000 | \$ 8,000 | Sponsors guaranteed to date |
| TOTAL INCOME | \$ 29,200 | \$ 25,725 | |
| EXPENSES | | | |
| INVITATIONS | | | |
| | Package Printing \$ 125 | \$ 150 | |
| | Package Postage \$ 225 | | Est |
| | Mailing Labels \$ 15 | | Names & Addresses Provided by CRCEA |
| | Envelopes \$ 50 | | Est |
| REGISTRATION | | | |
| | Printed Programs \$ - | \$ - | Provided by CRCEA |
| | Tote Bags \$ - | \$ - | Provided by CRCEA |
| | Package Printing \$ 150 | \$ 150 | Est |
| | Pocket Folders \$ 60 | | For 100 |
| | Goodies For Tote Bags \$ 200 | \$ 150 | Food Items |
| | Name Badge Holders \$ - | \$ - | Provided by CRCEA |
| | Registration Table Banner \$ - | \$ - | Provided by CRCEA |
| SESSIONS | | | |
| | Room Rental \$ - | \$ - | Comped |
| | Equipment Rental \$ 1,000 | \$ 400 | Joe Mckee will provide all AV equipment |
| | Raffle Prizes \$ 400 | \$ 100 | Raffle For Survey Return |
| | Speaker Expenses \$ - | \$ 100 | Speaker Appreciation Gift |
| | Monday Lunch \$ 3,000 | \$ 2,918 | Sponsored by Guided Choice (\$2,000) |
| | Session Breaks (4) \$ 4,000 | \$ 2,447 | Three of four are sponsored |
| | Photographer \$ 400 | \$ 400 | Includes DVD |
| | CRCEA Banner (2) \$ - | \$ - | Provided by CRCEA |
| HOSPITALITY | | | |
| | Room Rental \$ - | \$ - | Comped |
| | Food \$ 2,000 | \$ 1,320 | Sponsor |
| | Drinks \$ - | \$ - | Comped |
| BANQUET | | | |
| | Dining Room Rental \$ - | \$ - | Comped |
| | Decorations \$ 400 | | Est |
| | Banquet Meal \$ 6,080 | \$ 4,765 | \$45.00 + 9.90 Service Charge + \$5.20 Sales Tax X 80 and \$75.00 Setup Fee |
| | Wine and Corkage Cost \$ - | \$ 500 | Provided By Hotel |
| | Bartender Setup \$ 200 | \$ 200 | Depending on drink sales |
| | Entertainment \$ 2,000 | \$ 2,000 | \$1,000 Deposit Made |
| | Band Dinner Expense \$ 200 | | Six members |
| | Door Prizes \$ 800 | | Est |
| FINANCIAL | | | |
| | Association Fees \$ 1,500 | \$ 1,125 | Paid At End of Conference |
| | Refund CRCEA Advance \$ 1,000 | \$ 1,000 | Paid At End of Conference |
| OTHER EXPENSES | | | |
| | Committee Hotel Rooms | | |
| | Committee Banquet | | |
| | Committee Mileage | | |
| | Postage - Stamps \$ 150 | \$ 150 | Est |
| | Office Supplies \$ 100 | | Est |
| | Volunteer Mileage Charges \$ 300 | | Est |
| | Volunteer Parking Charges \$ 200 | | Est |
| | Signs-Materials & Svcs \$ 500 | \$ 280 | Est |
| | Conference Shirts \$ 350 | \$ 520 | Est |
| TOTAL EXPENSES | \$ 25,405 | \$ 18,225 | |
| NET | \$ - | | |

SOLICITATION LETTER 1
ASSOCIATION LETTERHEAD

Date

Business Name
Business Address
Business City

Dear (To Who It May Concern – Better to have a name and title if you can get it),

In (Month and Year), the (Association Name) County Retired Employees Association (acronym) will host the (spring/fall) conference of California Retired County Employees Association (CRCEA) at the (hotel name and location). These conferences are held throughout the state to allow the CRCEA's Board of Directors to gather to coordinate the administration of the Association which represents approximately 180,000 retirees statewide. Additionally, these conferences are used to maintain current knowledge of legislative updates, health care, senior safety, and other issues of importance to the members of our organization.

During this conference, there are several events which can be used to advertise your generous sponsorship and your support of our organization. Those events include morning and afternoon coffee breaks, (lunches if appropriate) two evening hosted hospitality events, a banquet dinner with entertainment, door prizes given at the banquet, and registration packet gifts (usually advertising promotional items).

This year, we would like to invite you to join with us to help present the best conference ever for our attendees who will be gathering from 20 different counties around California. Your **(organization's/company's)** support will be acknowledged in an upcoming issue of our (association name) and the CRCEA newsletters. Sponsors will be recognized with signage at the sponsored event location.

For your tax purposes, our Federal Tax ID No. is (XX-XXXXX). Your donation of either monetary support, products for door prizes, or sponsorship of one of our breaks or lunches would be most greatly appreciated. Since I am also retired, you can reach me at (XXX) XXX-XXXX for any questions and to confirm your participation.

Respectfully,

Officer or Chair sending letter
Your Association

SOLICITATION LETTER 2
ASSOCIATION LETTERHEAD

Date

Contact Name
Company
Address

Contact Name,

I got your name from the (company) website, and I hope this is being sent to the proper person to consider our request. If not, I would be very appreciative if you could forward it to the appropriate party.

My name is XXXXXXXX, and I am the (title) of a local organization called the name of association (acronym). We represent a group of retired public employees which numbers approximately 5,000 in our county. We are a part of a larger state organization, the California Retired County Employees Association (CRCEA) which represents almost 180,000 members throughout the state.

In (Month) of this year, our local group will be hosting the semiannual CRCEA training conference at the (Name) Hotel in (city). These conferences are held throughout the state to allow the CRCEA's Board of Directors to gather to coordinate the administration of the association. Additionally, these conferences are used to maintain current knowledge of legislative updates, health care, senior safety, and other issues of importance to the members of our organization.

During the registration process for these conferences, we provide the attendees with a registration packet which includes what we refer to as a "goody bag". This bag contains registration information, but it also has advertising and promotional items from businesses and corporations throughout the county. Most businesses provide us with items such as pens, note pads, chip clips, etc., and we would need approximately 150 items if (company name) would like to participate.

(Name of company) support would be acknowledged in an upcoming issue of both our (Association name) and the CRCEA newsletters, and your contribution will also be displayed on sign boards at the conference, and in our conference program.

Please allow me to thank you in advance for any consideration your company may be able to give this request. For your tax purposes, our Federal Tax ID No. is (XXXXXXXXXX)

(Name and Title)
(Association)
(Contact number or email address)

**CRCEA ASSOCIATION CONFERENCE ROTATION
2018 – 2026**

| | |
|--------------------|-----------------------------------|
| FALL 2018 | MARIN COUNTY |
| SPRING 2019 | SAN DIEGO COUNTY |
| FALL 2019 | SONOMA/MENDOCINO COUNTIES |
| SPRING 2020 | TULARE COUNTY |
| FALL 2020 | MERCED/STANISLAUS COUNTIES |
| SPRING 2021 | LOS ANGELES COUNTY |
| FALL 2021 | FRESNO COUNTY |
| SPRING 2022 | ORANGE COUNTY |
| FALL 2022 | SACRAMENTO COUNTY |
| SPRING 2023 | SAN BERNARDINO COUNTY |
| FALL 2023 | SAN JOAQUIN COUNTY |
| SPRING 2024 | KERN COUNTY |
| FALL 2024 | CONTRA COSTA COUNTY |
| SPRING 2025 | VENTURA COUNTY |
| FALL 2025 | ALAMEDA COUNTY |
| Spring 2026 | SANTA BARBARA COUNTY |

Imperial County has never hosted a conference, and San Mateo County has not hosted one in many years, so they are not listed in the current rotation.

SAMPLE AUDIO VISUAL EQUIPMENT RENTAL GUIDE

This price list is intended to be a general guide and it was current in 2016. Prices at various locations vary and the estimate from your hotel will most likely be higher.



EMBASSY SUITES

AUDIO VISUAL EQUIPMENT RENTAL GUIDE

POPULAR PACKAGES

| | |
|---------------------------------------|---------|
| Flipchart Package | \$50.00 |
| <i>Includes easel, pad & pens</i> | |
| Self-Adhesive Pad & pens | \$75.00 |

| | |
|---|----------|
| Projection Support Package | \$150.00 |
| <i>Includes room appropriate tripod screen, skirted stand, and power strip.</i> | |

| | |
|---|-----------|
| Fast Fold Support Package | |
| <i>Includes Front/Rea r screen, skirted stand, and power strip.</i> | |
| 6'x8' Frame Screen | \$200.00* |
| 7.5'x10' Frame Screen | \$250.00* |
| Wide Screen Formats | Inquire |
| Black Velour Side Drape (per 10' panel) | \$150.00* |

VIDEO/DATA PACKAGES

| | |
|---|----------|
| Meeting Room Projection Package | \$450.00 |
| <i>Includes 3500 lumen LCD projector, screen, skirted stand, and power strip.</i> | |

| | |
|--------------------------------------|----------|
| Wide Screen Format Projectors | Inquire |
| Value 3000 Lumen | \$350.00 |

| | |
|---|-----------|
| Ballroom Projection Package | \$750.00* |
| <i>Includes 6000 lumen LCD projector, screen, skirted stand and power strip</i> | |

| | |
|---|----------|
| Flat Screen Package | \$350.00 |
| <i>Includes 42-46" Flat Panel Monitor, Stand, VGA cable</i> | |

| | |
|--|----------|
| Digital Camcorder Package | \$250.00 |
| <i>Includes Digital Camcorder, tripod, AC cables</i> | |

AUDIO PACKAGES

| | |
|---|----------|
| Two Speaker Sound System Package | \$300.00 |
|---|----------|

| | |
|--|-----------|
| Podium Lighting Package | \$300.00* |
| <i>Includes (2) Leko lights, light tree, dimmer, 12 channel controller board</i> | |

| | |
|--|----------|
| Small Lighting Package | \$400.00 |
| <i>Includes (4) Leko lights, (2) light tree, (2) dimmer, 12 channel controller board</i> | |

| | |
|-----------------------------------|---------|
| LED Lighting (per fixture) | \$60.00 |
|-----------------------------------|---------|

More extensive fighting design available, please Inquire.

VIDEO EQUIPMENT

| | |
|----------------------------------|---------|
| DVD Player | \$75.00 |
| VGA Distribution amplifier 1 x 4 | \$55.00 |
| VGA Cable 25' | \$25.00 |

| | |
|--------------------|---------|
| Video Conferencing | Inquire |
|--------------------|---------|

AUDIO EQUIPMENT

| | |
|--|----------|
| Wireless Handheld / Lavalier Microphone | \$130.00 |
| Wired Microphone (Lectern, Table, or Standing) | \$50.00 |
| 4 Channel Audio Mixer | \$50.00 |
| 6 Channel Audio Mixer | \$75.00 |
| Computer Audio Interface | \$50.00 |
| CD Player | \$50.00 |
| Audio Conferencing | Inquire |

CONFERENCE AIDS

| | |
|------------------------------------|----------|
| Conference Telephone | \$100.00 |
| PC Laptop Computer | \$175.00 |
| Wireless Presenter w/Laser Pointer | \$40.00 |
| Skirted Projection Cart or Stand | \$25.00 |
| Extension Cord and Power Strip | \$20.00 |
| Sign Easel | \$15.00 |
| Whiteboard | \$75.00 |

A variety of audiovisual products are available for your event. This list represents only a portion of our most popular equipment and services.

If you require a technician for setting up your audiovisual equipment or operating the equipment during your event, a technician can be provided at the following rates

LABOR RATES

| | |
|-------------------|----------|
| Mon-Fri 6am-6pm | |
| Mon-Fri 6pm-12am | |
| Sat & Sun 6am-6pm | \$120.00 |
| Sat & Sun 6pm-6am | \$180.00 |
| Holidays | \$180.00 |

All equipment set ups are subject to a service charge of 22%. Guests who would like to bring their own equipment and require assistance with their set up or extensive services that require more than one hour to complete will be billed at the prevailing labor rate with a two hour minimum.

*Requires more than one hour to complete will be billed at the with a two hour minimum

USEFUL ACRONYMS

You can find many sources for deciphering acronyms, but the simplest by far is to simply type the acronym into the Google search box on the Internet. It will then take you automatically to a definition and explanation.

| | |
|---------------|---|
| AMCARE | (Mendocino) Association of Mendocino County Retired Employees |
| CCCREA | (Contra Costa) Contra Costa County Retired Employees Association |
| ICAEE | (Imperial) Imperial County Association of Retired Employees |
| MCARE | (Marin) Marin County Association of Retired Employees |
| REAC | (Alameda) Retired Employees of Alameda County |
| REAOC | (Orange) Retired Employees Association of Orange County |
| REAVC | (Ventura) Retired Employees Association of Ventura County |
| REFCO | (Fresno) Retired Employees of Fresno County |
| RELAC | (Los Angeles) Retired Employees of Los Angeles County |
| REMCO | (Merced) Retired Employees of Merced County |
| REOKC | (Kern) Retired Employees of Kern County |
| RESBC | (San Bernardino) Retired Employees of San Bernardino County |
| RESBC | (Santa Barbara) Retired Employees of Santa Barbara County |
| RESCO | (Stanislaus) Retired Employees of Stanislaus County |
| RESDC | (San Diego) Retired Employees of San Diego County |
| RPESJC | (San Joaquin) Retired Public Employees of San Joaquin County |
| SCARE | (Sonoma) Sonoma County Association of Retired Employees |
| SCORPA | (San Mateo) San Mateo County Retired Personnel Association |
| SCREA | (Sacramento) Sacramento County Retired Employees Association |
| TCREA | (Tulare) Tulare County Retired Employees Association |

1937 Act – County Employees Retirement Law of 1937 (Often shortened to '37 Act)

AB – Assembly Bill

ACA – Affordable Care Act (Also See PPAHC and OBAMACARE))

AG – Attorney General

ARC – Annual Required Contribution

CalPERS – California Public Employees Retirement System

CalSTRS – California State Teachers Retirement System

CERL – County Employees Retirement Law (also known as the 1937 Act or '37 Act)

CPF – California Professional Firefighters

COLA – Cost Of Living Adjustment

CSAC – California State Association of Counties

CSEA – California Scholl Employees Association

CSL – California Senior Legislature

DC/DB – Defined Contribution/Defined Benefit

FASB – Financial Accounting Standards Board (This the GASB private sector counterpart)

FPPC – Fair Political Practices Commission

GAAP – Generally Accepted Accounting Practices

GASB – (Sounds like GASBY) Government Accounting Standards Board

GPPOPEB – (Governor's Public Pension and Other Post-Employment Benefits Commission

LTC – Long Term Care

MMBA – Meyers-Milias-Brown Act

NCPERS – National Conference on Public Employee Retirement Systems
OBAMACARE – Slang term for Patient Protection and Affordable Care Act of 2010
OPEB – Other Post Employment Benefit
PAC – Political Action Committee
PPAHC – Patient Protection and Affordable Care Act of 2010 (Also known as Obama Care)
PEPRA – Public Employees’ Pension Reform Act
PERA – Public Employees Retirement Association
PERS – Public Employee’s Retirement System
PEMHCA – Public Employee’ Medical and Hospital Care Act
PER&SS – (State Assembly) Public Employment, Retirement & Social Security Committee
PE&R – (State Senate) Public Employment and Retirement Committee
PERB – Public Employee’s Relations Board
PERL – Public Employee’s Retirement Law
PORAC – Peace Officer’s Research Association of California
PPA – Pension Protection Act
PPACA – Patient Protection and Affordable Care Act of 2010
PRJ – The California Public Retirement Journal
RPEA – Retired Public Employees Association
SACRS (Sounds like Sackers) - State Association of County Retirement Systems
SB – Senate Bill
SEBA – Safety Employee’s Benefit Association
SEIU – Service Employees International Association
SPOT BILL – A bill that proposes non-substantive amendments to a code section on a particular subject; introduced to assure that a bill will be available (after the deadline to introduce bills) for revision by amendments that are germane to the subject of the bill.
STRS – (Sounds like STIRS) or CalSTRS – California State Teachers Retirement Systems
SRBR – Supplemental Retirees Benefit Reserve
STAR COLA – Supplemental Targeted Adjustment for Retirees
THE JOURNAL – The California Public Retirement Journal (Also See PRJ)