
CRCEA Conference Manual



The Conference manual is designed to standardize procedures for hosting a CRCEA conference. It is to be used as a guideline. Our intent is to be thorough, but it may not cover every contingency. When problems are not resolved locally, contact the CRCEA Conference Chair.

A copy of this Manual should be made available to host counties prior to their conference to guide Conference Planning.

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SECTION I

ADVANCE PLANNING

The Host Committee should develop a timeline chart of tasks to coincide with scheduled deadlines. In the instance where two counties are hosting the conference, the Host Committee should include members from both associations. The initial meeting should include the CRCEA Conference chair. Initial design of the program cover might reflect local history or characteristics. Previous conferences should be reviewed to avoid repetition. CRCEA will assist wherever necessary.

The ongoing cooperation between the Host Committee Chair and CRCEA Conference Committee Chair will guarantee a successful conference.

A. HOTEL SELECTION & ARRANGEMENTS

Depending on local conditions, the Host County should reserve conference facilities twelve (12) to eighteen (18) months in advance to include:

- Lodging – tentatively a minimum twenty-five (25) rooms each for Sunday, Monday, and Tuesday nights. If hotel has no elevator, all Meeting and Hospitality Rooms must be on the ground floor for access by handicapped. **Arrangements also should be made to add rooms as needed after the minimum number of rooms have been filled.**
- Meeting and Banquet Rooms must accommodate a **minimum of 100 persons.**
- Hospitality Suite must accommodate a **minimum of 100 persons.** It can be a large room or two smaller rooms co-located. It should have a wet bar, if possible.
- Executive Committee Meeting Room must accommodate a **minimum 40 persons.**
- Hotel should be in compliance with the Americans with Disabilities Act (ADA).
- Room Reservations
 1. Block Rooms for a minimum of twenty-five (25) rooms for Sunday, Monday and Tuesday. (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 at the same rate.
 2. Room reservations are to go to the hotel directly. The hotel may supply you with information and map to include in the registration packets.
 3. Negotiate with the hotel to comp (not charge for) any needed rooms, i.e. meeting rooms, hospitality room, sleeping.

B. CONTRACT

- Read the contract very carefully. **Do not** accept any liability for the conference at the hotel. If they have a liability clause and will not waive it in writing, go some where else. **Do Not Sign It.**
- 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.) Officers of the ExCom have reviewed many contracts and may help avoid misunderstandings. You cannot sign for CRCEA without authorization from the ExCom. You may sign for your local association with their 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 change 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.)
- Discuss Audio/Visual requirements and costs with the hotel's Audio/Visual personnel. Try to get a price list that indicates costs of using items such as podium, wireless microphones, lapel microphones, use of hotel sound system in meeting room. Determine if there is any charge/restrictions to bring in your own equipment.
- A pre-conference deposit to the hotel is normally required and is usually a percentage of the total costs.

C. HOTEL SET-UP

- Classroom style seating for a **minimum of 100** persons for Monday, Tuesday; 75-80 on Wednesday.
- Water service on the tables or at the back of the room.
- Audio Visual Equipment.
 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 to ascertain his/her A/V requirements
 5. Riser for panel presentations
- Flags
 1. An American flag to the left of the podium, as you face it.
 2. A California State flag to the right of the podium, as you face it.
- Tables
 1. Two (2) tables at the back of the room for the coffee breaks.
 2. Two (2) tables at the back of the room for Delegate reports and handouts.
- Hospitality Room(s)
 1. Usually one (1) large room or two (2) smaller adjoining rooms.
 2. Find out if CRCEA may supply food and beverages. Some do not allow it.
 3. Finger food is usually served during the hospitality hour, either catered by the hotel or furnished by the host if permitted. More food is served on Monday than Tuesday, due to the banquet.

4. Alcoholic beverages are sponsored by an Affiliate member and is considered an added social activity provided by the host county and an Affiliate. It is the responsibility of the host county to make arrangements for such activity with the Affiliate directly.
- Coffee Breaks
 1. There are three coffee breaks:
Monday – 3:00 PM
Tuesday – 10:00 AM and 3:00 PM
 - Coffee Break Menu
 1. Mornings – Coffee, regular and decaf, hot tea. Pastries, (plan for 80 -100 attendees)
 2. Afternoons –Assorted diet and regular sodas, iced tea, assorted cookies.
 - Banquet Dinners
 1. If possible, offer one beef, chicken, fish and vegetarian meal. Include dessert. However , do not exceed a reasonable price. The Hotel will require a definite number approximately 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 set at the same price for attendees.
 - Entertainment
 1. Make sure there are accommodations for entertainment, including a microphone, risers, dance floor, etc.
 2. One or more tables may be required if there are door prizes.
 - Decorations
 1. Any type of table decoration, hand made or purchased, is acceptable and may be used for door prizes.

D. CONFERENCE ANNOUNCEMENT

- The host association shall prepare a conference invitation packet which shall be mailed to attendees at least 60-45 days before the conference date. The packet should include: an invitational letter, a registration form, CRCEA President’s invitation letter; Host Association invitation letter; Hotel information; Tentative Agenda. Sample of Forms and documents are included at the end of this Manual.
- At least 60 days prior to the conference, CRCEA’s Executive Committee will approve the Tentative Agenda and provide a set of mailing labels with the names of Delegates and other potential attendees who should receive an invitation packet. It is up to the Host Planning Committee to invite their local association members.
- CRCEA will design and print conference programs.

E. COMMITTEE ASSIGNMENTS

- Designate one (1) person to receive all registration forms and money (usually the Association Treasurer.) Most associations set up a separate bank account for the conference (others use their existing account and keep separate records on everything received from the conference). A budget for estimated conference expenses/income should be made and submitted to the CRCEA Conference Chair for review by the Executive Committee. (See page 23 for sample budget information.)

- A list of all attendees, their county and their registration status shall be provided to all attendees at registration.
- The final list of all attendees (address, email, county, registration status) shall be provided to the CRCEA Secretary by the end of the Conference Wednesday morning.
- One (1) person (usually the chairperson) should be designated to receive material to be distributed at the conference.
- One (1) person should be in charge of the banquet entertainment, set-up of tables, coordination with entertainment, door prizes, etc.
- One (1) person should be in charge of centerpieces for the banquet tables.
- One (1) person should be in charge of obtaining donations to offset costs of the conference, unless the host organization does not want to do this and will pay for all expenses from their treasury.
- Greeters should be appointed to welcome guests upon arrival at the hotel.
- A hospitality reception food chairperson is needed to obtain food, see that it is in place in the hospitality room, and clean up afterwards, unless the hotel is providing the food.
- One (1) person should be in charge of sending out the invitation packet of material before the conference. Packets should be mailed in 9x12 white envelopes with a stamped notice on the front indicating the contents are important conference materials (stamp will be available from the CRCEA Conference Chair.)
 1. Delegate (complete Packet)
 2. Alternate Delegate (complete Packet)
 3. Retirement Board Member (complete packet)
 4. Retirement Board Member Alternate (complete packet)
 5. Investment Board Member (complete packet)
 6. CRCEA Officer (complete packet)
 7. Guest [example spouse] (complete packet)
 8. Affiliate – (complete packet with registration form marked “Exempt” on Attendee Fee line)
 9. Host Committee – (complete packet with Attendee fee marked “Exempt” on Attendee Fee line)
 10. Speaker (complete packet except Registration form)
- Electronic copies of invitational packet materials (especially the invitation letters from CRCEA President and local association president and the registration form, should be sent to the CRCEA Webmaster to be placed on the CRCEA website.
- One (1) person should be in charge of making up the registration packets before the conference. One packet containing all materials (such as the program booklet and all other handouts) should be made for each Attendee. Special care should be taken to see that Delegates receive all materials. Packets shall also be made up for guests and others attending the conference.
- Name Badges & Packets – CRCEA provides name badge holders. The Host Committee provides the badge inserts. They are inserted into each holder and then put into each registration packet/bag. Badge inserts may be decorated and shall have registration designations as indicated on Sample Form #3, Page 16.

SECTION II

CONFERENCE RESPONSIBILITIES

The CRCEA Conference Chair and the Host County Conference Chair are responsible for planning and executing regular conferences. The underlying assumption is that co-operation between the two Chairs will insure success of the conference.

A. CRCEA RESPONSIBILITIES

- Coordinates with host county to review plans including specific conference dates.
- Assists in selecting speakers.
- Provide mailing labels and other materials for mailing, including CRCEA President invitation letter. Host County should provide an invitation letter from their Association President.
- Assist host county preparing conference program. (See Policy Statement on Presentation Topics and Speakers for CRCEA Conferences elsewhere in this manual.)
- Contract to have program printed and delivered to host county
- CRCEA Secretary or Executive Secretary will serve as Conference Secretary.
- Disburse contribution to Host County towards expense of conference.
- Arrange a meeting with the next host committee to share experience.
- Insure that next host county has CRCEA banners, badge holders and any other conference materials from CRCEA.

B. HOST COUNTY RESPONSIBILITIES (some responsibilities are repeated for emphasis)

- Form a Planning Committee of approximately 10 people.
- Request CRCEA to provide conference start-up money (currently \$1,000 per Conference) for establishment of Host County Conference Fund and initial expenses. This loan should be paid back to CRCEA if possible.
- The Host Committee should establish special financial procedures. There should be separate accounts for conference income and expenses.
- Select a hotel at least twelve (12) months in advance of Conference.
- Book at least twenty-five (25) rooms per night for Sunday, Monday and Tuesday nights. (i.e. Non-smoking, handicap access, etc.).
- Arrange for meeting, hospitality, and banquet rooms.
- Negotiate price for banquet and refreshments for social hours and breaks
- Prepare invitation letter and registration form and mail with tentative agenda 60 to 45 days prior to conference.
- It is up to the Host Association to invite their own members by whatever methods they deem most effective (newsletter, special mailings, email, etc.)

- Obtain speakers (in cooperation with CRCEA Conference Chair and Executive Committee) necessary for the program agenda. See Presentation Policy Statement on Page 7 of this Manual. Members of the local association(s) should be asked to introduce speakers.
- Maintain accounting records of receipts and disbursements, facilitating final report.
- Collect registration fees:
 - \$75.00 for each Member Association sending a Delegate to the Conference; this money will be sent to the CRCEA Treasurer following the Conference.
 - \$35.00 for all other attendees (excluding Affiliates and Local Host County Conference Volunteers); this money should be designated as Host County conference income.
- Arrange entertainment at banquet, including door prizes and decorations

During the Conference the Host Conference Committee members should be readily available to provide any help or support if needed. Areas of concern are:

- Welcoming members throughout conference
- Additional audio/visual equipment needs.
- Copying services.
- Break periods.
- Social hour problems.
- Registration problems.

A list of all who have pre-registered for the conference shall be furnished to all registered attendees prior to the opening ceremonies on Monday afternoon. The list will include name, 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. Registration forms filled out by the attendees should be given to the CRCEA Secretary after the Conference.

FINAL REPORT FORM – After the Conference is over and the Host County has received all their Conference final costs and had sufficient time to finalize their records, they shall submit to the CRCEA Secretary, Treasurer, CRCEA Conference Chair and Host Committee Chair of the next Conference, the CRCEA Host County Conference Report. (See Pages 14 & 15 of this Manual). This report is very important.

The 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 and ways, we might improve future conferences.

SECTION III

POLICY STATEMENT

PRESENTATION TOPICS AND SPEAKERS FOR CRCEA CONFERENCES

Background and Purpose: 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 a successful conference.

It is not the intent of this policy statement 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 Chair.

Objective: To insure that the majority of conference sessions contain educational information on subjects and issues that are important and relative to all CRCEA Associations. Some examples of acceptable topics are:

- Topics and issues relating to County Retiree Pension and Medical Plans.
- County Retiree Healthcare Programs and Activities.
- Benefit issues for Retired County Employees.
- Education Topics relating to Retired County Employees.
- State and Federal Legislation related to Retired County Employees.
- Topics relating to County Retirement Systems.
- Topics relating to CRCEA Associations.
- Topics relating to fund investments and actuarial issues.

Responsibility for the selection of session topics and presenters: The **CRCEA Executive Committee (CRCEA Officers)** is responsible for the selection of all session topics with the following exceptions:

The Conference Host Committee is responsible for the Opening Ceremonies (presentation of colors, flag salute, invocation, etc.) and the selection of the Speaker for the Welcoming Address. The Conference Host committee will be given the opportunity to select one topic session with a speaker of their choice. This session is normally designed to be informative and entertaining.

Session Topics Suggestions and Input from Host Committee, Conference

Committee and Association Delegates and members: While the CRCEA Executive Committee has the responsibility for the selection and approval conference topic sessions, CRCEA welcomes input and suggestions from the Host Committee, the CRCEA Conference and Standing Committees and CRCEA Association delegates and members. (All suggestions must comply with the Policy Statement on Presentations and Speakers on Page 7 of this Manual.)

Coordination of Suggestions and Input: Coordination of Suggestions and input relative to Session Topics and Presenters is the responsibility of the CRCEA Conference Committee. Association members who have suggestions regarding conference topics will direct their suggestions to the **CRCEA Conference Committee Chair**. The Conference Committee Chair will forward the suggestions to the CRCEA Executive Committee for consideration.

Timing for Suggestions and Input on Session Topics: The CRCEA Executive Committee recommends that conference session topics and presenters are confirmed 3 to 4 months prior to the scheduled conference. Accordingly, suggestions and input from CRCEA members are asked to submit their suggestions 3 to 4 weeks after the preceding conference or a least 3 months prior to the upcoming conference.

POLICY STATEMENT

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. Hosting a Conference requires that the Host Association must begin initial money expenditures several months before the Conference actually takes place. CRCEA recognizes that most member associations do not have sufficient funds in their local treasuries to take on the added expenses of Conference hosting.

Purpose of this Policy: To help minimize the financial impact upon local Associations resulting from their participation as Host for a CRCEA Conference when their Association takes its turn in the rotation as Conference Host Association.

HOST ASSOCIATION RESPONSIBILITY:

- The Host Association should provide a written request for the \$1,000 start-up money to the CRCEA Treasurer when they are ready to establish a Conference Fund (usually at the time of signing the Hotel Contract which often requires a deposit.)
- The Host Association should provide a Budget outlining their expected expenses and income for the Conference to the CRCEA Treasurer, at least six months in advance, as one of their first steps in the planning process. (See page 23 for sample budget information.)
- As part of their hosting duties, it is the responsibility of the Host Association to attempt to raise funds to defray 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, not able to participate in other ways, often are willing to make monetary donations and special fund-raising activities are also a good source of conference funding.

- 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.
- In the event that 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.

CRCEA RESPONSIBILITY:

- Provide \$1,000.00 as start-up money upon request with which the Host Association can establish a Conference Fund, separate from their Association funds, which is to be shown as CRCEA Conference accounting, which is to be shown as CRCEA Conference and Expenses.
- During the conference planning period, provide assistance to the Host Association by reviewing their proposed Conference Budget, pointing out possible places where costs can be trimmed and providing advice on minimizing expenses.
- In case a deficit is incurred by the Host Association, CRCEA may provide additional funding upon receipt of a request and documentation from the Host Association in order to defray actual Conference expenses.

SECTION IV

AFFILIATES AND/OR CONTRIBUTORS

The pressure on Affiliates to market their product requires guidelines that will enable the Affiliate Chair and Host County Conference Chair to deal with situations without having to assume a personal responsibility. The following are guidelines. In the event of any question regarding the application of these guidelines, the Host Committee Chair will contact the CRCEA Conference Committee Chair.

The following guidelines have been adopted by the Executive Committee and are part of the Operations Manual.

A. DEFINITIONS:

AFFILIATE:

A company whose membership application is approved and has paid the annual fee.

CONTRIBUTOR:

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

- Sponsoring a Conference activity, such as a meal or coffee break.
- A contribution to help defray costs of a Conference.
- Any items used in Delegate packets (goodie bags).
- Sponsoring a non-conference activity (use of facility for meetings).

B. RIGHTS:

AFFILIATE:

- Company name is listed on CRCEA letterhead.
- 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.
- Sign posted at Conference crediting Affiliate during activity they are sponsoring.

CONTRIBUTOR:

- Company or individual name listed in CRCEA Conference Program Booklet.
- Sign posted at Conference crediting Contributor for 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 Delegate 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).
- Should be introduced at some convenient time during each Conference.
- **Solicitation of Conference attendees for marketing a company's services or products is to 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:**

- Solicitation of Conference attendees for marketing a company's services or products is to be done with discretion.
- 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 prior to printing to ensure accuracy as to content and that dues are current.
- Affiliate Members may be listed on next to last page of booklet. The 37 Act Counties may be listed below in alphabetic order.
- Contributors should be listed and their contribution acknowledged.

F. THE WEBSITE:

Affiliates will be invited to submit a promotional feature that will run continuously until revised. The site may have photos and clip art but no animation or flashes at this time.

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 Registration Form.....Page 13
- CRCEA Form #2: Final Conference Report/Explanation of Terms.....Pages 14-15
- CRCEA Form #3: Conference Name Badge.....Page 16
- CRCEA Form #4: Host County Conference Invitational Letter.....Page 17
- CRCEA Form #5: CRCEA President Invitational Letter.....Page 18
- CRCEA Form #6: Conference Survey Sheet.....Page 19
- CRCEA Form #7: Sample Program Agenda.....Pages 20-22
- CRCEA Form #8: Sample Conference Budget....Page 23

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 ___ Alternate Delegate ___ Ret.Bd.Mbr. ___ Ret.Bd.Mbr.Alt. ___

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

CONFERENCE ASSOCIATION FEE \$75.00 (include on Delegate Regis.form only) \$ _____

ATTENDEE FEE OF \$35.00 _____ **Each** \$ _____

(To be paid by every attendee (including spouses) except Affiliate and Host Conference Volunteers)

BANQUET REGISTRATION FORM

PRIME RIB – QTY _____ @ \$ _____ Each \$ _____

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

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

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

TOTAL AMOUNT ENCLOSED \$ _____

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

COMPLETE THIS FORM AND MAIL TO:

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

MAKE CHECK PAYABLE TO: _____

Note: Host Counties may add 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.

CRCEA HOST COUNTY FINAL CONFERENCE REPORT

_____ County

(Explanations of items below are on page 14)

INCOME

ITEM	AMOUNT	COMMENTS
Association Fees (\$75.00)		
Banquet Fees		
CRCEA Contribution		
Refund of Deposits		
Attendee's Fees (\$35.00)		
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
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

INCOME

- Association Fees \$75: Total of all registration fees sent in by each Association
- Banquet Fees: Total of all fees received for Banquet
- CRCEA Contribution: CRCEA's contribution to Host County – Currently \$1,000.00
- Refund of Deposits: Total of any fees refunded to Host County
- Other Contributions: Total of all funds received from Contributors

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, stamps etc.
- Decorations: Total costs of table center pieces or other decorations
- Certificates: Total costs of any certificates for speakers
- Association Fees: Total of all Association registration fees remitted to CRCEA
- Entertainment: Total of all fees paid for entertainment

STATISTICS

- Total Registrations: Number of persons registered for Conference
- Number of Delegates: Delegates only, not Alternates
- Number of Attendees: Number of paying attendees at \$35
- Number at Sessions: Estimated number of persons who attended each session
- Number at Social: Estimated number of persons at Socials
- Coffee Breaks: Estimated number of persons who attended each coffee break
- Banquet: Total number of persons at 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

Name Badges – Name badge holders are provided by CRCEA. The badge inserts, can be color-coded as an option, are inserted into each holder and then put into each registration packet/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

	CRCEA (Spring or Fall) CONFERENCE (Dates of Conference) (City Conference is being held in)
NAME OF ATTENDEE County and Initials of attendee's home assoc. DESIGNATION (Delegate, Guest, Alternate, etc.) Hosted by (Initials and County)	

(Note: Logo on Badge does not have to be CRCEA logo, it can be any logo Host County desires)

(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
200x) 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 \$35 for each attendee (excluding Affiliates) and \$____ for each banquet
reservation.

Hotel reservations are to be made directly with the hotel before (Date). Please note the room
rate is \$____ plus xx% tax for a total of \$____. The hotel has a restaurant on site and free
parking.(If applicable) When making reservations be sure to mention you are with CRCEA 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 and to your participation 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

This is a sample of the letter which will be sent to the Host County by the CRCEA President. It will be on CRCEA letterhead stationery and ready for copying for inclusion in the invitational packet of registration materials.

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 22 – 24, 2012** in beautiful Stanislaus County, California, hosted by the Retired Employees of Stanislaus County (RESKO) and the Retired Employees of Merced County (REMCO) to be held at the **Modesto Doubletree Hotel**.

Traveling to Stanislaus County will give you the opportunity to visit more of California's beautiful central valley counties. With its agriculture and history, along with wonderful restaurants, RESKO and REMCO encourages you to join them for this conference.

CRCEA continues our work to providing you with current educational information relative to our present and future county retiree issues, so I am pleased to inform you that our Host Committee, your CRCEA Executive and Conference Committees have worked hard to bring you a meaningful and enjoyable Conference.

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

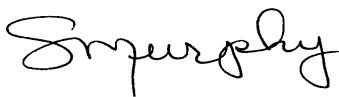
With the end of the legislative year in Sacramento nearing, time has been planned for our Legislation Session. We hopefully will bring together CRCEA legislative consultant Amy Brown and other "experts" from the Sacramento scene. Their analysis is always interesting and should provide insight into the 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, including the election of officers. We will consider other business brought before the Delegates, who are the Board of Directors and the official voting body for CRCEA. 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 Modesto.

Sincerely,



E. F. "Skip" Murphy, President

SAMPLE CONFERENCE SURVEY SHEET
20XX (Spring/Fall) Conference – (Name of Host County)

CRCEA Form #6
Conference Survey Sheet

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 Form #7

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)**

10:00 a.m. **Executive Committee Meeting: (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. – 4:45 p.m. **Breakout Sessions:** If you are not assigned to a Committee, please join any Committee.

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. – 10:45 a.m. **Introduction of Affiliates** – Affiliate Committee Chair

10:45 a.m. – 11:45 a.m. **Presentation (Title)**

Speaker: (Name, title, company/organization)

Introduction: (Name of person making introduction)

11:45 a.m. – 1:30 p.m. **Lunch – On Your Own**

1:30 p.m. – 3:00 p.m. **Round Table Session** – Skip Murphy

Speakers: (Names, if necessary will be provided by CRCEA)

3:00 p.m. – 3:15 p.m. **Afternoon Break**

3:15 p.m. – 4:30 p.m. **Legislative Report – Legislative Committee Chair**

Panel: (Names and titles will be provided by CRCEA)

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. – 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 Spring 20XX Conference (Name, County)

Closing Remarks: CRCEA President

SAMPLE CONFERENCE BUDGET

INCOME

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

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

CRCEA Contribution (\$1,000.00)

Host Association Advance (if any)

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

Registration Fees *(Number of attendees times Registration Fee of \$35.00)*

Other Contributions *(Contributions from businesses/organizations)*

Donor #1

Donor #2

Donor #3

TOTAL INCOME

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.

EXPENSES

REGISTRATION

Printing

Envelopes

Name Tags

Items for goodie bags

SESSIONS

Meeting Room Rental

Audio-Visual and any other Equipment Rental

Break, Monday afternoon

Break, Tuesday morning

Break, Tuesday afternoon

Soft Drinks/Water/Coffee

Sponsor Signs

HOSPITALITY HOURS

Room Rental

Food

Drinks

BANQUET

Room Rental

Decorations

Banquet Meal

Banquet Wine

Entertainment

Prizes

FINANCIAL

Association Fees *(20 times \$75.00 – remitted to CRCEA after the Conference)*

Refunds *(Registration cancellations/ Refunds made to Host Assn. and/or CRCEA to repay advance seed money)*

OTHER EXPENSES

Office Supplies

Other

TOTAL EXPENSES

NOTE: When calculating costs for hotel food, food services and any other hotel service, it is important to remember hotels also add in taxes and gratuities when making their final billing. This can increase costs significantly (by at least 18% or more) of the final costs of banquets, breaks, or any other service provided by the hotel.