

# A Guide to Hosting CALAFCO Conferences and Workshops

## FORWARD

CONGRATULATIONS. You are now the host of an upcoming CALAFCO conference or workshop. These events are both a rewarding experience for the organizers...and a lot of work. They are the most important benefit to members and a highly valued learning experience. The membership and the CALAFCO Board of Directors appreciate and thank you for your contribution to the goals of LAFCo.

This Guide was originally written by **Shirley Anderson** of San Diego LAFCo. An experienced CALAFCO meeting planner, Shirley's guidance will be invaluable to you. The Guide was updated in 2006 to add program planning and workshop information, as well as reflect current Association policies.

### FORWARD TO THE FIRST EDITION

This overview of planning and producing the CALAFCO Conference is by no means exhaustive. In some cases it only hints at the opportunities for customizing the meeting according to local resources; nevertheless, it should give you an idea of what time and staffing is required from the hosting LAFCo.

Prudent planners would start organizing a full year in advance. Life being what it is, however, the activities discussed here can be—and indeed frequently are—compressed into a shorter time. Remember there are plenty of experienced hosts within the CALAFCO community; don't hesitate to call on them for help and sympathy.

—Shirley Anderson, San Diego

## GETTING ORGANIZED

CALAFCO events depend on volunteer professional staff from member LAFCos and associate members. In addition, the Conference typically has one or more members of the Board of Directors who participate in a leadership role on the committee.

Getting the volunteers organized and working effectively with the CALAFCO staff is the first step in hosting an effective event. Conferences and workshops have two basic committees: The Host Committee and the Program Committee. These two committees work closely with the CALAFCO Executive Director and the Executive Officer in producing the event.

Event planning begins with a LAFCo offering to host a conference or workshop. CALAFCO maintains a five year schedule of future conferences and workshops. Initially the work of the event falls to the host LAFCo and the executive director in identifying the site, determining a date, securing a contract, and any other logistics that require long lead times, such as reserving event facilities for banquets or receptions. Within a year of the event, the Program Committee is appointed (and in the case of a conference a Board member is appointed as chair) and the detailed planning begins.

The chart and descriptions below provide an overview of roles and responsibilities. The majority of the work is done within two committees. The **Program Committee** is responsible for all aspects of the program, from selecting the theme of the event, to speakers, to printing the final program. In between that are all the logistics of creating session topics, securing speakers, speaker confirmations, moderators, and arranging audio-visual equipment.

The **Host Committee** is responsible for the logistics of the event. That ranges from hotel arrangements to meal selection to managing the event registration. Details about here with registration forms,



budgets, bank deposits, registration packets, social events (such as a wine tasting), mobile workshops, and signs and banners. This committee will get a lot of help and support from the CALAFCO staff and this Guide.

CALAFCO staff will also provide support and guidance to the committees.

Generally there is at least one joint meeting of both committees to kick off the planning effort. It is helpful, however, for several individuals to serve on both committees. Often those individuals include the Conference chair, Host Committee chair, and the Executive Director.

**Executive Director:** Works primarily with the Host Committee on site selection, contracts, budget, fees, and other logistics for the event. The ED must sign all contracts, and approves the budget and fees. The ED also works with the Program Committee and provides guidance and coordination as needed.

**Executive Officer:** Appoints the committee chairs from LAFCo staff, and recruits volunteers to participate on the committees. The EO is responsible for financial management, and will work with the Host Committee on financial tracking, accounting, deposits, and payments. All payments must go through the EO. The EO or deputy EO may also serve on the Program Committee and provide guidance as needed.

**Board of Directors:** Provides overall policy guidance to CALAFCO events, usually through the Executive Director. For the annual conference, the Board appoints one of its members to serve as Chair of the Conference. The Chair provides overall guidance to the conference program and the conference committees.

## TWO YEARS OUT

### ▶ **Select conference date**—*Host Committee*

In consultation with the Executive Director, the Host Committee proposes the date of the conference. Take into consideration national and religious holidays, CSAC and League of Cities conference dates, and major conferences booked in your area that may limit available hotel space. The sales managers of local hotels or the Convention and Visitor Bureau (CVB) will have calendars of major conventions. If possible, select two alternative dates; this flexibility may be useful in booking the hotel of

your choice. Typically the annual conference is held the week after or before Labor Day, and the staff workshop is held in mid- to late April.

### ▶ **Begin site search**—*Host Committee*

With potential dates in hand, you can approach the site search in two ways. Often the CVB will assist by distributing a Request for Proposals to hotels that can accommodate the size of the conference or workshop. A sample RFP is included in Appendix E. After receiving responses, the CVB staff may be able to save you a lot of work by setting up visits with those that can accommodate our group. Alternatively, you can conduct telephone interviews with the sales manager of hotels directly. Explain LAFCo and CALAFCO to establish credibility; suffer usual jokes about acronym; and let the sales manager know that CALAFCO has a history of annual meetings to establish credit record. It is often helpful to have an RFP ready to go, because it answers most of the questions the hotel staff will have. See *Summary of CALAFCO Conferences and Workshops* in Appendix A.

Here are some minimum requirements that potential sites must accommodate:

- ◆ Annual Conference—225 guestrooms, meeting space for 325, including up to five simultaneous breakout rooms
- ◆ Staff Workshop—90 guestrooms, meeting space for 125, including up to four simultaneous breakout rooms

It may be helpful to explain that your city is the official conference site. Sales people tend to be more responsive if they think they are definitely in the running and not just the subject of random inquiries. Ask if the hotel has sufficient guestroom space available on the conference dates and if there will be adequate meeting space for your group functions. There is obviously no need to pursue any hotel that cannot meet these criteria. Request a promotional and meeting space brochure from each hotel meeting your needs.

With the CALAFCO executive director, schedule a meeting (or ask the CVB to schedule the meetings) with the sales manager of qualifying hotels to view the property. An adroit manager will invite you to lunch; go—take the staff—it's a great opportunity to sample the kitchen's work and observe the service staff.

► **Prepare for site inspection**—*Host Committee*

Prepare criteria to evaluate and compare the hotels. Your criteria should include room rates and the cost and availability of meeting room space, but should otherwise be tailored to qualities you feel will enhance the conference in your area and be attractive to attendees. For example, proximity to the beach would be a decision factor in a coast location.

Also prepare a draft schedule of public space requirements. The conferences are all similar in public space needs:

- Space in a visible location is required for registration and 8-10 tabletop exhibits throughout the conference;
- Space for office use and storage;
- Availability of internet service in the meeting and public spaces;
- Room for 75-90 in a classroom or conference set-up with a box lunch for the pre-conference LAFCo 101 and/or other seminars the morning of the first day;
- CALAFCo meets in general session each day and requires a room that will accommodate the entire membership in a classroom set-up;
- The first day is concluded with a reception, preferably held in an interesting location away from the day's meeting rooms;
- Breakout session rooms will be needed on the first and second day of the event;
- For the Conference, the Board of Directors will require a board room for the Board meeting and lunch on the last day beginning at noon;
- Consider where breakfast, lunch, and coffee breaks will be served;
- Breakfast on the second and third days is generally served buffet style in three separate rooms for small group forums; and
- A reception/banquet/entertainment is typically held on the evening of the second day, either in the hotel or at an off-site location.

► **On-site inspection**—*Host Committee*

With your evaluation criteria and list of room needs in hand, peruse meeting rooms and public spaces. Some rooms are usually preferable to others. A diagram of public space that lists capacities for different room arrangements (theater, classroom,

banquet, etc.) should have been included in the hotel promotional materials. Note immediately which rooms you favor, as they will all run together in your mind after you've looked at a few hotels.

Are sufficient public rooms available to facilitate general sessions, breakout sessions and meals? Will you need to leave the meeting rooms for meal set up? If the event is limited to only one room you'll be forced into serving only buffet-line meals because the food service staff will be unable to set-up table service if you're using the only available room for meetings. It is also tricky to schedule sessions when the hotel staff needs to set up or clean up a room.

Inquire about air conditioning controls; are the rooms individually controlled? If meetings are taking place during your tour of the hotel, try to observe how crowded the rooms appear. Check out the restrooms for cleanliness (yes, do it! — messy restrooms are an indication of poor service levels). Are the restrooms easily reached from the public rooms or is it a long hike? Is there a concierge? (Indicates attention to guest services—and your objective *is* to make your guests content.)

Look at where the meeting spaces are and how participants move around. Are the elevators to guestroom and meeting spaces fast (computer controlled) or will that be a bottleneck? Are meeting spaces together? Are they easy to find or remote? Be wary of meeting spaces that are remote or spread apart, particularly if they require participants to use elevators or stairs in order to move between sessions.

Look at options for unique places to hold receptions or dinners. Is there a special outdoor area, or a penthouse room with a view? Inquire about the hotel's alcohol policies. Can you bring in your own beer and wine for a reception, or do you have to use the hotel's service?

Look at the *Daily Event Board*. Is it in an obvious location? This is incredibly important. Traveling people need clear directions. Are the names of the organizations posted on the board spelled correctly? Are there any directions for locating the meeting rooms?

What are the number and quality of in-house restaurants? What are the neighborhood alternatives for guests wishing to eat outside the hotel?

Look at several guestrooms. If the hotel is older and undergoing remodeling, when will the work be completed? Will there be sufficient remodeled rooms to house CALAFCo? Will work be going on

(noise, confusion) during the conference? Ask about water pressure and air conditioning in an older property. Does the hotel have internet available in guestrooms? Are some areas of the hotel more desirable than others—perhaps with views; will CALAFCO be housed in the more desirable areas?

What about check-in? Will guests stand in long lines or will they have the convenience of pre-registration and speedy checkout? What is checkout time? In a large hotel, request details of other conventions booked on the same dates as CALAFCO. Will there be competition for public space? Are the public rooms arranged so that competing groups will be distinctly separate from CALAFCO?

If there is only one hotel in your area—go through the same inspection—it will alert you to deficient areas to discuss with the hotel staff.

▶ **Negotiate with hotel**—*Host Committee and Executive Director*

After completing the inspection and narrowing your choice of hotels, you are ready to begin negotiating with the hotel sales manager for a contract to house the conference. All negotiations should be done with the executive director and the Host chair.

1. **The room block** or number of rooms that CALAFCO will use over the three-day meeting will be stipulated as a “block” in the contract. The hotel will reserve these guestrooms exclusively for CALAFCO until approximately 30 days before the event. CALAFCO is guaranteeing that they will book the stipulated number of guestrooms. Hotels vary in their practices; however, generally, the cost of using public space for the meeting and meals is tied to the number of rooms reserved. The exact date of the room-block release will be written into the hotel contract.
2. **After the room-block release date**, the hotel will not guarantee guestroom space to anyone wishing to make a reservation for the CALAFCO conference.
3. **Strategically set the room-block number.** If the number is set to low *and* if the hotel has otherwise sold all other guestrooms, some CALAFCO members may be denied rooms. On the other hand, if the room block is set too high, and CALAFCO members do not use all the rooms blocked, CALAFCO risks incurring charges for not meeting the minimum guarantee. If reservations have fallen

significantly below the block guarantee, there are likely significant penalties, including payment for unused lodging rooms and/or payment for meeting room rental. Thoroughly examine the proposed contract for penalties. Consult the statistics from past conferences and confer with CALAFCO before committing.

4. **Hotel room rates are flexible and** may change depending on the size of the business you bring to the hotel, the season, the occupancy rate of the hotel, and how eager the sales manager is to book your business. You may be able to lower the room rate quoted to you by 10 percent. ASK—negotiate—they can only say no.

A CALAFCO conference is a nice little piece of business and you are in a position to make certain requests in exchange for awarding the hotel the conference. Feel free to go back and forth with the hotel on the contract until you are comfortable that it is right for your conference. Make sure that your expectations of what services the hotel will provide are verified in writing. Any special arrangements that you negotiate, for example, reduced parking rates, or housing in specific guestrooms should appear in the contract.

▶ **Contract provisions**—*Executive Director*

The following minimum arrangements should be defined in the contract:

1. **Guestroom rates** should apply for either single or double (s/d) occupancy. The negotiated rate should be extended to CALAFCO members who wish to arrive early or remain at the hotel after the conference. Additionally, any rooms booked for dates preceding or following the conference should apply towards CALAFCO’s complimentary rooms (see 2).
2. **Complimentary (free) guestrooms** are generally available based on the number of rooms booked by CALAFCO. The industry standard is one free room night for every 50 rooms booked. Hotel rooms are tallied in 24-hour increments. So . . . 100 rooms booked for two nights equals 200 rooms. Using the industry standard, this translates to four free room nights. CALAFCO uses complimentary rooms for VIPs or speakers. Usually, there are options for turning two standard room nights into a suite (for a reception maybe?). Verify that rooms engaged by CALAFCO members for dates before or after the conference dates will apply towards the free room account.

3. **Public space should be provided free-of-charge** based upon revenues that CALAFCO will guarantee. Hotel contracts normally outline a square-foot charge for public space if the guest room bookings drop a certain percentage below what you have guaranteed in your contract (recall warning to strategically set room block guarantee).
4. **Public space of your choice should be guaranteed** in a large hotel. You have compiled a schedule of room needs and have toured the facility so you are ready to stipulate what meeting rooms are required each day and each hour. Vary the rooms if possible; sitting in the same room for three days can get very boring. Generally, hotels will allow you to make last minute moves to another room—in spite of the contract—if alternative public space remains unsold.
5. **Outdoor functions must have backup indoor space reserved.** The hotel will reserve an alternative location for each outdoor function. A food and beverage addendum to the contract will stipulate an hour when you will need to decide which location to use. Threatening rain, temperature drop, etc., may force you to cancel outdoor meals, however, don't let this inhibit you from considering outdoor functions. They are especially popular and some fun things can be done with barbecues, picnics, or poolside banquets.
6. **VIP Suite for Receptions.** Many hotels will include one large VIP suite either with their complements or at a reduced rate. This can often serve as a reception room for attendees, as you can bring your own alcohol to these 'private' rooms.

**NOTE:** After initial arrangements have been completed, it is unlikely that you will hear from the sales manger or the credit department again. Catering, convention services, (or some similar department) will assume responsibility for actually producing your function.

7. **The hotel should provide direct mail or on-**

**line hotel reservation forms.** CALAFCO is not involved in the reservation, registration, or billing of hotel rooms. Each LAFCo deals directly with the hotel. CALAFCO is only responsible for including the hotel's reservation form in the registration packet mailed to each LAFCo. Many hotels will offer you a free webpage that can be used to make hotel reservations.

8. **The amount of the service charge (gratuity) charged on all food and beverage** and other services involving labor should be declared in the hotel contract. Be forewarned that these charges may add 25 percent or more to all food and audio-visual costs.

▶ **Credit—Executive Director**

At some point, the hotel credit manager will call and ask for credit references. The executive director will complete the credit application.

CALAFCO's credit history is of sufficient stature that a deposit should **not** be required. If you are able to establish a total credit operation, the hotel may require that 50 to 75 percent of the Master Account be paid before you leave the hotel (CALAFCO EO will be there with the checkbook). The balance will be due in 10 to 15 days when the hotel winds up last minute food and beverage and miscellaneous charges and sends you a final bill.

If you are able to establish total credit account, some hotels will even allow other vendors to use their billing. For example, if you choose a florist that frequently works with the hotel, the floral services may be added to the master account and billed through the hotel's final billing of the master account. You don't have the CALAFCO checkbook, so keeping the number of bills low reduces the need for coordination between yourself and CALAFCO.

You will be asked about whom is authorized to contract for CALAFCO. All contracts must list CALAFCO as the contractee and be signed by the executive director. The CALAFCO logo or name should appear on all contracts, reservation forms, and in-hotel promotional materials. Make arrangements for all CALAFCO charges to be made to one master account. You and the ED should be the *only authorized signers to this account.*

▶ **Contact the CVB—Host Committee**

After signing a hotel contract, inform your local

Convention and Visitors Bureau of the dates and how many rooms will be booked. The CVB should have numerous resources to help with your production—everything from tourist brochures for the registration packet, to free clerical labor. CVB services are based on the number of room nights you book in the community. They will want to confirm your contract with the hotel before they offer their services. Ask them to send a list and samples of their services and products. In areas without a convention and visitors bureau, investigate your local Chamber of Commerce for possible convention services.

## TEN TO TWELVE MONTHS OUT

About one year out is when the BIG planning really begins. By this time the Executive Officer should be recruiting people to serve on the committees and in leadership roles. In the case of the conference, the Board typically appoints the chair at their September Board meeting. The host and program committee membership should be determined by this time

### ▶ **Arrange the first full committee meeting—*Host and Program Committees***

Now is when the two committees (program and host) become defined and start working together. It is recommended that the first meeting include all the participants involved in the event planning. Typically plan on holding this meeting on-site at the hotel. The hotel should provide you with a complementary meeting room.

Among the tasks at this first meeting:

- ◆ Introduce everyone and discuss roles
- ◆ Overview of arrangements made to date
- ◆ Tour the hotel facilities, including meeting, social and guestrooms
- ◆ Determine preliminary schedule
- ◆ Select a conference theme and logo
- ◆ Walk through the budget
- ◆ Walk through conference planning timeline, with particular focus on key deadlines (preliminary program, final program, speaker arrangements, room reservations, A/V requirements, final meal numbers, and so on—see Appendix C)
- ◆ Discuss general ideas for the program, including tracks, mobile workshops, keynote speakers, special sessions
- ◆ Make assignments of major responsibility areas

This usually involves lunch for approximately 15-20 people and is an opportunity to put the catering department to a test. Sample menu items for possible use during the conference and observe how the service staff reacts to special requests for changes during the meeting.

Typically most of the follow-up meetings can be handled by conference call. Contact the CALAFCO office for information on how to set up on-demand conference calls. You may want to consider one additional meeting of the full committee later in the process to firm up final details.

Follow the meeting with a letter to the catering manager or conference coordinator, which outlines any service glitches or disappointments that occurred during at the committee lunch. Compliment a job well done and begin to establish a relationship with the staff who will be responsible for making your conference a success. *You need these people!*

### ▶ **Develop the budget—*Host Committee***

CALAFCO will provide you with a boiler-plate to use in creating the budget for the event. Use the hotel catering menu and audio-visual price list as guides, prepare a budget for receptions, meals, coffee breaks and special events. ***This is the single most important function of conference planning.*** Be sure you have a current menu; inquire whether new prices will be published before the conference dates (if higher prices are forthcoming, try to lock-in the current prices as an addendum to your contract). You might want to develop alternative menu scenarios in low, medium, and high price ranges. Factor in all other costs: audio-visual, flowers, music, buses, printing, nametags, attendee gift, banners and other expenses, as well as a minimum return of 15% to CALAFCO (see *Sample Budget* in Appendix B.) Be aware that taxes and gratuities will add 26-30 percent to your food, beverage and A/V costs; be sure they get added into the budget. The CALAFCO ED will approve the budget

CALAFCO has a policy on conference and workshop credits for people who had to cancel. There will be a certain number of credits that need to be built into the budget and registration system. Contact the Executive Director for the current credit balances that would apply to this event.

### ▶ **Set registration fee—*Host Committee and Executive Director***

After you have developed all costs, consult with the

CALAFCO ED to establish the registration fee. The registration fee will need to cover all costs, provide for a contingency over-run and allow a profit to CALAFCO.

CALAFCO has a policy on spouse/guest registration fees. These fees should reflect actual costs. As much as possible, have separate fees for special events (such as the banquet or luncheon) so guests can choose what they want to attend. Be aware that the banquet will be expensive!

▶ **Develop Draft Program**—*Program Committee*  
After the first meeting, the program committee should develop a draft program, with the major program components, breakout sessions, topics, titles, and those speakers already identified. The program should also identify the people responsible for coordinating each session.

At this point you should be locking in keynote speakers and major presenters. Schedules fill quickly, so you will want to be contacting your “name” speakers early in order to get them committed. This is also the time to start making arrangements and seeking speakers for the mobile workshops.

*A word on mobile workshops:* These have become increasingly popular as a pre or post conference learning opportunity. Typically they are scheduled for the morning prior to the beginning of the workshop or conference. Mobile workshops are a great way to show off your area, and see the outcomes of what LAFCoS are doing “on the ground.” Mobile workshops have an additional registration fee which should cover all the costs associated with the tour (buses, morning coffee, lunch, printed materials). If you will be using buses, work with the host committee to solicit bids and select a bus company early.

## SIX MONTHS OUT

▶ **Develop a task time-line**—*Host Committee*  
Conference planning is a multi-task discipline. Organize a master time-line with mailing dates, decision points and deadlines (see *Task Timeline* in Appendix C for an example). Create a single time-line that is used by both committees.

▶ **Develop mailing list**—*Host Committee*  
CALAFCO will have mailing lists for all LAFCo and Associate members; State Legislators involved with LAFCo; and other associations and consultants

**POLICY ON SPEAKER COSTS:** If requested, CALAFCO policy is to pay EITHER transportation costs or one night lodging for speakers, plus meals and program costs while they are at the event. Often speakers will cover their own costs. Honorariums or other expenses require the prior approval of the executive director. Please alert the committee chair if you offer to pay any expenses.

normally invited to the conference. You are responsible for adding local guests and speakers to the lists.

▶ **Hold the Date Mailing**—*Program and Host Committees*

People will need to hear about the event several times to get it on their calendar. Plan on sending out an enticing “Hold the Date” mailing six months out. This simple mailing should include dates, hotel reservation information, costs, preliminary program information, and highlights of special features of the event (banquet) and the area. Include photos and other elements that will get people excited about attending. Have the executive director review before printing.

Be sure and have the information posted on the CALAFCO website. You can also include links to area information and other materials. People plan early, so get the information out to them.

▶ **Arrange banquet music, decorations, and details**—*Host Committee*

Traditionally, CALAFCO has a banquet with some sort of entertainment on either the first or second evening. Depending on your location, this may involve busing people to another location. Investigate what the hotel can do for you first. If you go off-site, transportation will add to conference costs and the resulting loss of revenue to the hotel from fewer meals may impact your hotel contract guarantees. Money spent on buses can be spent on catering and entertainment. Many people would rather not be captive somewhere, waiting for the bus to take them back to the hotel. If you do select off-site facilities, tie-up the date and price now.

Before selecting an off-site location or caterer, double check the contract with the hotel and see if there is a minimum you are required to spend on food and beverages. Make sure you will meet the minimum before you use another caterer. This number is not negotiable after the event, so you want

to avoid a situation where you are paying for food you didn't get.

▶ **Set up hotel reservation system—*Host Committee***

Generally, hotels have the ability to custom print their hotel reservation forms with the name of the event and the conference dates. Request hotel brochures to include in the registration packet that you will mail to each LAFCo. Find out the toll-free number for reservations, and be sure people will be able to get the CALAFCO rate at that number. Double check the name to use when making reservations.

Many hotels are now offer web pages that you can personalize for the event. Then you simply link to this website and participants can make reservations on-line, as well as get other information about the local area.

Make sure you know the details of how participants get the special CALAFCO rate. Inform the hotel of all the potential names attendees may use when making a reservation (CALAFCO, LAFCo, Local Agency Formation Commission). People will want to make reservations early, so be sure these systems are ready to go before announcing the reservation number or website.

▶ **Sponsors—*Program and Host Committees***

Recent conferences and workshops have solicited sponsors to underwrite a portion of conference costs. Sponsorships can help pay for enhanced amenities, such as a briefcase, a nicer selection of food at a break, or drinks at a reception.

Gaining sponsor support is double-edged. The revenue is nice of course, and can mean the difference between a really nice reception or just chips and salsa—however, it also requires time and energy to properly acknowledge and thank the sponsors. In addition to program inserts recognizing the sponsors, it's appropriate to give them table space to display their literature, display their name on posters, invite them to the conference programs, and generally give them differential treatment. While CALAFCO does not have an 'exhibit hall' make arrangements to provide tables in the registration area for sponsors. The cost of those tables, along with any meals you offer, should be built into the sponsorship amounts. Typically the minimum sponsorship is \$300-\$500, with options for \$1,000 and \$1,500 or more for special sponsorships. For example, if you will be providing a briefcase, a

sponsorship opportunity would be to include the logo of a firm if they sponsor most or all of the costs.

▶ **Finalize Program Content—*Program Committee***

By five months out, the program should be nearly final. This is particularly important for the conference as you will be entering the summer months and it is difficult to contact people. You will want to have a complete tentative program to include in the registration package. People will want a good idea of the session topics and speakers before they register. LAFCos report that program is the most important factor in deciding whether to attend or send people to conferences and workshops.

## FOUR MONTHS OUT

▶ **Send Out and Post Registration Packets—*Host and Program Committees***

The timing of sending and posting the registration packets is critical. The annual conference packets must be distributed by 1 May. Many LAFCos have sporadic meeting schedules during the summer and make the decision to attend before summer breaks. For the staff workshop and other events, two to three months lead time is sufficient, assuming a "save the date" announcement was sent earlier. Have the executive director review all materials before printing. Be sure and also post all materials on the CALAFCO website.

Items to include in the packet:

1. Tentative program and speakers.
2. Information sheet explaining conference dates, costs, CALAFCO refund policy, travel instructions, parking directions, spouse activities and any special events or programs that may require special clothing or arrangements. It's nice to add a map with driving instructions from the airport and major highways.
3. Many hosts prepare an invitational cover letter that further promotes the event.
4. Registration form (collect complete information: name, name for badge, address, LAFCo, e-mail, phone number). Complete one registration per person. CALAFCO staff can give you examples.
5. Hotel information and registration.
6. Promotional materials from the hotel and/or the

CVB.

▶ **Registration System**—*Executive Director*

All registrations are mailed to the CALAFCO office in Sacramento for processing. The CALAFCO staff will post the registrations and prepare weekly reports for the Committee. The staff will also send confirmations to registrants. Hotel reservations are the responsibility of each participant and not included in the conference/workshop registration process.

▶ **Finalize Program Details**—*Program Committee*

The program committee should be finalizing all remaining details of the program by this point, including:

1. Confirm speakers for each session (see sample speaker confirmation in the appendix).
2. Write brief descriptions for each session.
3. Identify moderators or hosts for each session.
4. Prepare session materials.

▶ **Develop menus**—*Host Committee*

Call the catering manager if the catering department has not contacted you by this time. The catering and/or convention services departments will be responsible for producing all functions. These staff people should be extremely helpful to your planning. They want your return business and references and they are a *service* industry. Use them to guide your menu choices and for suggestions on organizing room set-ups.

Generally, meals should be varied in content and presentation. Avoid three days of all buffet meals or repeating the eggs-bacon-potatoes routine for both breakfasts. Inquire about theme meals such as outdoor western barbecues or poolside lunches. The steak vs. chicken vs. fish imbroglio cannot be resolved. Be sure and have tasty vegetarian options available at every meal (something more than a salad). Don't lose sleep trying to please everyone.

Because you have already prepared sample menus to develop costs, you should be somewhat familiar with the menu options. Your budget also creates expense limits to which the catering department must conform.

## TWO AND ONE-HALF MONTHS OUT

▶ **Mail registration reminder**

If registration has been slow, consider sending a mail and/or electronic reminder. A reminder can take many forms but should be designed to relay a sense of urgency in submitting CALAFCO registration money and—most importantly—motivate LAFcos to make hotel reservations.

▶ **Order Event Materials**—*Host Committee and/or Executive Director*

Work with the executive director to order supplies and materials for the event. These may include:

- ◆ Nametags, holders, lanyards, ribbons
- ◆ Speaker gifts, if any
- ◆ Attendee gifts (briefcase, etc.)
- ◆ Banners
- ◆ Signs and Posters (session names, sponsors, directional)
- ◆ Folders and other office supplies

## TWO MONTHS OUT

▶ **Finalize Program Details**—*Program Committee*

The program committee should finalize all remaining details of the program by this point, including:

1. Confirmed speakers for each session (see sample speaker confirmation in the appendix).
2. A/V needs for each session.
3. Identified rooms for each session (take into account size and anticipated attendance; also A/V needs—try to minimize A/V rentals as it is very expensive).
4. Selected a host/moderator for each session, to moderate panel discussions or assist speakers with set-up and introductions
5. Secured bios for each speaker

▶ **Finalize menus**—*Host Committee*

Make final decisions on menus (you will not declare the *number* of meals until approximately 48-72 hours before the conference). Generally, meals are set at banquet rounds of 10-12 place settings. If the room is large enough to accommodate additional tables, instruct the hotel to use a set-up for eight. You might experience resistance to this as additional

tables mean additional wait staff must be scheduled; however, try. Twelve place settings make a very congested banquet round— try not to let them push you into this setup. Decide whether head tables or standing podiums for speakers.

Consider how meal tickets will be handled. Do you want a strict accounting (no ticket, no meal) or a more lenient policy? Establish a system or procedure with the hotel staff that complies with your decision.

Select linen colors for each meal. If you have factored flowers (for reception or buffet table) into budget ask the catering staff for recommendation of florists familiar with the hotel's layout and decor.

### THIRTY DAYS OUT

#### ▶ **Prepare work schedule**—*Host Committee*

Begin to prepare a day-to-day, hour-by-hour work schedule that incorporates programs, meals, equipment, audio-visual, and signage requirements (see Appendix for an example of a *Conference Work Schedule*).

Because the event will involve multiple tasks and responsibilities, it is important to set up some sort of tracking system so you don't spend the entire time worrying that you've forgotten something. This means developing a very detailed plan *on paper* for each event. Even the Board of Directors meeting (at the conference) for 15-20 people requires a specific room set-up with specific equipment and possibly a lunch. Over the three-day event, you may be checking on 20 different functions, each requiring an individual set-up. There could be 15 different meals and coffee breaks. Don't assume that you can handle this from memory.

The hotel catering staff will prepare a schedule of tasks for which they are responsible: room set-ups, audio-visual and meals. You—however—will have additional responsibilities (speaker-name tent cards, registration desk staffing, orchestrating spouse tour, directing buses to special events, etc.) that will need to be integrated into the schedule.

#### ▶ **Prepare graphics, name badges, rosters, and tickets**—*Host Committee*

CALAFCO will prepare name badges according to the registrant's instructions on the registration form.. Each badge should contain first name, full name, title and LAFCo:

JOHN (in large print)

**John Smith** (bold)

Commissioner

Wazoo LAFCo

Speakers, CALAFCO Board members, Board candidates, sponsors, conference committee members, and CALAFCO staff all have ribbons attached to the badge. CALAFCO will provide the ribbons.

CALAFCO has designed signs that welcome members, give directions to specific programs, and list the sessions that will occur in each room. These signs are placed on easels at the registration desk, in the lobby or at remote banquet and reception locations, and in front of each meeting room. Easels are supplied by the hotel and should be ordered along with the audio-visual equipment.

#### ▶ **Reserve audio-visual equipment**—*Host Committee*

Confirm the audio-visual order with program chair. When you place your order for the A/V, confirm who will be responsible for maintaining the equipment during the conference and how they can be quickly contacted in an emergency.

A/V equipment can be very expensive to rent from the hotel. Check with the hotel on bringing your own projectors and laptops for PowerPoint presentations. Asking LAFCos to bring equipment can save a lot of money. The hotel will provide screens and A/V carts for a small charge. Carefully review microphone needs too. Wired mics are cheaper than wireless, but be sure you get what's needed. There's nothing more frustrating than not being able to hear. Also, there is generally an A/V tech from the hotel on duty during the event so you can make last minute changes. Just remember that everything you ask for—from extension cords to a podium—has a charge.

#### ▶ **Print final program and speaker name tents**—*Program Committee*

The program committee is responsible to prepare and print the final program. Work with the host committee to review content. You will need to include the names and logos of sponsors, CALAFCO Associate members, and the CALAFCO Board and staff. Check with the executive director on what needs to be included, and for a final review before printing. Be sure and include room names, facility maps, and speaker names and titles. A brief description of breakout

sessions is also helpful. The program should also thank all the committee members by name.

Name Tent cards—visible from the back of the room—must be prepared for each speaker.

▶ **Print packet materials**—*Host Committee*

In addition to the program there will be other materials to print and include in the registration packet. Check on including the following items:

- ◆ Evaluation
- ◆ Map of facilities
- ◆ Promotion piece for next year
- ◆ Business meeting agenda
- ◆ Elections materials

▶ **Prepare conference packets**—*Host Committee*

Each registrant will receive a packet at the registration desk upon check-in. The packet will include a registration receipt, name badge, final conference program, roster of attendees, and tickets for meals, drinks at receptions, or mobile workshops. Many LAFcos have included a local dining guide and tourist brochures of the area.

▶ **Submit VIP list to hotel**—*Host Committee*

CALAFCO may want specific guests to receive upgraded services, fruit baskets, etc. Submit this list to your hotel convention services coordinator. A limited list (3-4) should receive VIP services at no charge—depending upon the room guarantee.

▶ **Review hotel's comprehensive schedule**—*Host Committee*

The hotel will provide a schedule for each function for your final approval. The schedule will list menus, A/V, seating arrangements, linens selected, and any special arrangements you have requested. Carefully review the schedule before signing; this is your final chance to alter arrangements. Get a corrected copy of the schedule if changes are necessary.

Check to make sure that American and California **flags** will be included on the stage for general sessions and the business meeting.

▶ **Audit hotel reservations**—*Host Committee and Executive Director*

The reservation manager should be able to give you a daily update on the number of rooms being reserved—either by phone or fax. Because complimentary rooms and public space are based on the number of guest rooms CALAFCO guaranteed

in its room block, it's helpful (to your sanity) to track how many rooms are being reserved.

Don't be surprised to see the room block filled, and then just before the event see rooms cancelled. Work with the Executive Director if additional rooms need to be added to the block. If you add rooms, that will increase the guaranteed block and should too many cancel there could be significant penalties. Often the Clerks will share room cancellations on their list-serve so they can be transferred among LAFcos. Rooms cancelled through the hotel are usually lost once the cutoff date is reached, and participants are unable to take advantage of the reduced CALAFCO rate.

## SEVENTY-TWO HOURS OUT

▶ **Set meal guarantees**—*Executive Director*

The hotel contract stipulated that you inform the hotel of the specific number of meals you will guarantee. Generally, this will be required 48 to 72-hours prior to the first meal. The hotel will prepare the guaranteed number of meals plus a small percentage additional. ***You will be charged for every meal guaranteed—even if it never leaves the kitchen.*** If your group consumes the additional meals that the hotel prepared you will be charged for the larger number.

Consult with the CALAFCO Executive Director before you set the meal guarantee. Meal functions are generally under attended and the meal guarantee is usually set strategically low in an effort to reign in costs. Nevertheless, you need to be very careful to order enough food. If you under order, it's generally not possible for the hotel to crank out more meals at the last minute. There are exceptions, of course, but don't count on it.

## DURING THE CONFERENCE

1. Staff the registration desk at an early hour on the first day of the event. If there is a pre-event social program or mobile workshops first thing in the morning, you will want to open the registration area around 2:00 p.m. the day before.
2. Bring the binder with the alphabetically filed registrations. When someone insists they paid for such-and-such—you will have a record. Arrange to have a telephone at the desk. It is also helpful to have a laptop with all the event and printer at registration. This also allows you can print up

nametags for last minute registerees and misspellings. If CVB has provided you with labor, great—otherwise try to have the desk staffed with two of your own staff. The registration desk functions as a central message control for the conference. Organize a system for message posting; have pens and paper available; provide change for the public telephone; have a system ready to accept checks for last minute special event tickets; be ready with information about the hotel and neighborhood restaurants; and keep extra copies of the program ready. The desk should remain staffed at least through the second day. *Don't forget to have meals delivered to your staff at the registration desk.*

3. Acquaint yourself with the hotel staff when you arrive. If you have not already met the convention coordinator in charge of your function, be sure you introduce yourself immediately and understand how this person can be reached *at all times*. Find out what to do in advance when a breakdown occurs—projector bulbs do burn out! Have names and telephone numbers of everyone who can assist you. If the coffee is late, how do you expedite and cover at the same time? If the microphone starts to howl, where is the volume control? Most coordinators will have pagers and you have arranged for a telephone (remember) at the registration desk. Contact the convention coordinator about air-conditioning problems; incorrect room set-ups—anything that is going wrong. Establish that the ED and you are the only persons with the authority to make requests of the hotel staff or to ***sign anything***.
4. Each meal or reception will be presided over by a captain. The same person will probably be the captain assigned to several of your functions. Learn their name; introduce yourself and explain what you'd like to see happen in terms of timing. For example, during the evening banquet, it may be necessary to push the meal back if the before-dinner social hour appears to be still going full steam as the dining hour approaches. Keep the captain informed of what is going on. ***This person is the key to a smooth running event.***
5. In some hotels the captain will ask you to sign for meals following each event. Audit charges for food and beverage as they are presented to you; tax and gratuity will already be added onto the total.

6. If wine will be served, arrange to have a specific number of open bottles (perhaps two whites and two reds) placed on the tables. Any consumption over the pre-arranged number of bottles will need to be OK'd by you. Following the meal, you will probably be asked to sign a separate check for the wine. It is not considered brazen to request an inventory of the empty bottles. At hosted receptions where tickets were collected for drinks, there should be an audit of tickets against the hotel's charges.
7. The program committee should have a host or moderator assigned to each session to ensure it goes well. He or she can also introduce the session and speakers, make sure it starts and ends on time, and assist with A/V and handouts. ***NOTE:*** Have backup speakers in mind for each session in the event a speaker is late or cancels at the last minute.

#### **AFTER THE CONFERENCE**

Partial payment of the master account may be due before you leave the hotel. All meal charges, A/V, etc. have been charged to this account. The CALAFCO Executive Director will have the checkbook. Review the charges and ask CALAFCO for a check. Disputed charges can be resolved in the final billing that you will receive in a few days.

That's all there is to it—go home and have a glass of wine.

## **SUMMARY OF EVENT ACTIVITIES**

### **TWO YEARS OUT**

- Select conference date
- Do on-site inspections and make hotel selection
- Negotiate contract with hotel

### **TEN-TWELVE MONTHS OUT**

- Arrange first host and program committee meeting to plan conference
- Develop the budget and fees
- Prepare draft program

### **SIX MONTHS OUT**

- Develop task time-line for conference details
- Secure contracts for special events, buses, etc.
- Send out “Hold the Date” mailing
- Start securing sponsors
- Finalize program content

### **FOUR MONTHS OUT**

- Prepare and send out registration packets (later for workshop)
- Prepare registration system
- Organize receivables system
- Finalize program

### **TWO AND ONE-HALF MONTHS OUT**

- Mail registration reminder
- Order event materials and supplies

### **TWO MONTHS OUT**

- Finalize program details and A/V
- Finalize menus

### **THIRTY DAYS OUT**

- Prepare work schedule
- Prepare name badges, rosters, tickets, name tents and graphics
- Reserve audio-visual equipment
- Print final program
- Print and prepare registration packet
- Submit VIP list to hotel
- Review comprehensive hotel schedule
- Audit hotel reservations

### **SEVENTY-TWO HOURS OUT**

- Set meal guarantees

### **DURING THE CONFERENCE**

- Staff registration desk
- Acquaint yourself with hotel staff
- Monitor each program session
- Audit meal and bar charges

### **AFTER THE CONFERENCE**

- Make partial payment of Master Account
- Return records to CALAFCO

**APPENDIX A**  
*Conference and Workshop History*

<p>1970—Stockton Bus ride/Barbecue Ranch</p> <p>1980—Santa Clara Marriott Hotel</p> <p>1981—San Diego Kona Kai Club \$46 single/\$56 double Bay cruise/hors d'oeuvres Luau at hotel</p> <p>1984—Sacramento El Rancho Racquet Resort \$75 single/double River cruise/wine tasting Dinner/dancing</p> <p>1985—San Diego Vacation Village \$76 single/double Dinner at Sea World</p> <p>1986—Santa Cruz Dream Inn \$75 single/\$85 double Train ride/barbecue lunch Wine tasting reception Dinner/big band dancing</p> <p>1987—Irvine Hilton Hotel \$70 single/double Tour of Thomas Brothers Beach party</p> <p>1988—Monterey Monterey Sheraton \$88 single/double Bus to Monterey Aquarium Reception, dinner, jazz Spouse tour—local sights Registration fee \$145</p> <p>1989 Spring—Sacramento Hyatt Regency \$87 single/double River trip Registration fee \$165 Spouse fee \$100</p>	<p>1989 Fall—San Luis Obispo Cliff's Hotel at Pismo Beach Outdoor reception Bus to winery for reception/dinner/band Spouse tour winery/bakery Registration fee \$155 Spouse fee \$75</p> <p>1990 Spring—Placer County Granlibakken Resort \$186 single/\$256 double Outdoor reception Bus to casino dinner/gambling Registration fee: \$75 Spouse fee: \$55</p> <p>1990 Fall—San Diego Hotel Del Coronado \$139 single/double Room block: 250 rooms Oceanfront reception Poolside reception with fortune tellers/outdoor banquet/jazz Spouse tour-Tijuana Registration fee \$225 Spouse fee \$115</p> <p>1991 1992 1993 1994</p> <p>1995—Placer County Resort at Squaw Creek October 18-20 \$99 single/double Reception above valley Banquet in hotel CALAFCO fee \$225 Spouse fee \$40</p> <p>1996—San Diego Marriott Marina Hotel September 11-13 \$147 single/double Reception/banquet in hotel Baseball/golf on own Registration fee \$225 Spouse fee \$40</p>	<p>1997—Placer County Resort at Squaw Creek November 5-7 \$99 single/double</p> <p>1998—Pismo Beach Cliff's Hotel at Pismo Beach September 9-11 <i>Past, Present and Future</i> \$95 single/double Outdoor reception/karaoke Bus to market/ Las Vegas night Pre-conference golf Registration fee \$300 Spouse fee \$80</p> <p>1999—Monterey Doubletree Inn September 1-3 \$79 single/\$99 double Bus to Monterey Aquarium Reception and buffet Registration fee \$300 Spouse fee \$80</p> <p>2000—San Diego Westin Horton Plaza Hotel August 30-31, September 1 <i>Forces of Change</i> \$84 single/\$94 double Outdoor reception/zoo animals, chair massage, magician, jazz Outdoor banquet/dessert light show Registration fee \$350 Spouse fee \$80 Room Block: 340 (170 rms/2days) Rooms booked: 401 over 8 days     158 rooms on Wed night     154 on Thurs night Total expenses \$58,183 Registered: 240 Attended: 270 (includes speakers, etc.)</p> <p>2001 Annual Conference— Mariposa County Tenaya Lodge October 31-November 2 <i>Next Century's Challenges; Last Century's Issues</i> \$120 single/double</p>
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Registration fee \$300  
Spouse fee \$80/\$150 depending  
on field trips  
Glacier Point reception  
Total expenses \$78,686  
Registered 197  
Spouse/guest 72

**2002 Annual Conference—Santa  
Barbara**

Fess Parker Doubletree Resort  
November 13-15  
*LAFCo's in the 21<sup>st</sup> Century:  
Cooperation vs. Confrontation*  
\$149 single/\$159 double  
Reception and luau  
Registration fee \$350  
Nonmember fee \$450  
Spouse fee \$100  
Total expenses \$59,903  
Registered 240  
Spouse/guest 49

**2003 Staff Workshop—Lake  
County**

Konocti Harbor Inn  
May 1-2  
*Sharing Our Knowledge Across the  
State*  
\$110 single/double  
Registration fee \$160  
Spouse fee \$75  
Assoc. Mem Sponsor \$200  
Total expenses \$11,064  
Registered 59  
Assoc Sponsor 2  
Spouse/guest 6

**2003 Annual Conference—San  
Francisco**

Crowne Plaza Hotel  
September 24-26  
*Bridges Over Troubled Waters*  
\$159 single/double + \$33  
parking  
Reception and banquet  
Registration fee \$350  
Nonmember fee \$450  
Spouse fee \$100  
Total expenses \$78,573  
Registered 230  
Spouse/guest 32

**2004 Staff Workshop—Santa**

**Cruz**  
Charminade  
April 21-23  
*The Ongoing Process & All That  
Jazz*  
\$120 single/double  
No dinners  
Registration fee \$190  
Assoc. Mem Sponsor \$350  
Spouse fee \$75  
Total expenses \$18,403  
Registered 86  
Assoc Sponsor 2  
Spouse/guest 2

**2004 Annual Conference—  
Anaheim**

Disney Grand Californian  
September 8-10  
\$159 single/double + \$18  
parking  
Reception only  
Registration fee \$390  
Nonmember fee \$450  
Spouse fee \$100  
Total expenses \$52,980  
Registered 214  
Spouse/guest 23

**2005 Staff Workshop--  
Bakersfield**

Four Points Sheraton  
April 20-22  
\$84 single/double  
Santa Maria BBQ  
Registration fee \$180  
Spouse fee \$75  
Total revenues \$14,555  
Total expenses \$10,893.49  
Registered 78  
Spouse/guest 1

**2005 Annual Conference--  
Monterey**

Portola Plaza Hotel  
September 6-9  
*Charting a Course Today; Lighting  
the Way Tomorrow*  
\$84 single/\$114 double  
Reception and dinner at  
Monterey Maritime Museum  
Mobile Workshop-\$35/person  
Registration fee \$390  
Nonmember fee \$450

Spouse fee \$100  
Total revenues \$110,644.32  
Total expenses \$86,544.55  
Registered 235  
Spouse/guest 38

**2006 Staff Workshop—South  
Lake Tahoe**

Embassy Suites  
April 26-28  
\$84 single/double  
“Spaghetti Western” Banquet  
Registration fee \$180  
Spouse fee \$75  
Total revenues \$15,878.47  
Total expenses \$14,747.01  
Registered  
Spouse/guest 0

**2006 Annual Workshop—San  
Diego**

Westin Horton Plaza  
September 5-7, 2006  
\$120 single / \$134 double  
*Stepping up to the Plate*  
Registration fee \$390  
Nonmember fee \$450  
Spouse fee \$150  
Total expenses \$  
Registered  
Spouse/guest

**2007 Staff Workshop—Orange  
LAFCo**

Hyatt Regency Newport Beach  
April 11-13, 2007  
\$159 single/double  
*Beyond Boundaries*  
Registration fee \$225  
Nonmember fee \$325  
Spouse fee \$100

**2007 Annual Conference--  
Sacramento**

Hyatt Regency Sacramento  
August 29-31, 2007  
\$119 single/double  
*Sustainability” LAFCo’s Role in  
Meeting the Challenge*  
Registration fee \$390  
Nonmember fee \$450  
Spouse fee \$90-\$165  
Total expenses \$83,748  
Registered 260

Spouse/guest 30

[2008 Staff Workshop—Santa](#)

[Clara LAFCo](#)

Crowne Plaza San Jose

April 2-4, 2008

\$140 single/double

[2008 Annual Workshop—Los](#)

[Angeles](#)

Sheraton Universal

September 2-8, 2008

\$159 single/double

[2009 Staff Workshop—San Luis](#)

[Obispo](#)

The Cliffs Resort, Shell Beach

April 29-May 1, 2009

\$159 single/double

[2009 Annual Workshop—Fresno](#)

Tenaya Lodge at Yosemite

October 27-30, 2009

\$139 single/double

[2010 Staff Workshop—Sonoma](#)

[LAFCo](#)

[2010 Annual Workshop—](#)

[Riverside LAFCo \(Palm Springs\)](#)

APPENDIX B  
Sample Conference Budget

**FINAL BUDGET**  
**CALAFCO 2007 Annual Conference**  
28-31 August 2008 • Hyatt Regency Sacramento

	PER PERSON		TOTAL	
<b>REVENUES</b>				
Regular Registrations	250	\$380.00	\$ 97,500.00	
NonMem Registration	10	\$450.00	\$ 4,500.00	
Guest Registrations	10	\$100.00	\$ 1,000.00	
One Day Registration	4	\$225.00	\$ 900.00	
Mobile Workshop	40	\$40.00	\$ 1,600.00	
Sponsorships	4	\$1,500.00	\$ 6,000.00	
Sponsorships	4	\$1,000.00	\$ 4,000.00	
Sponsorships	1	\$500.00	\$ 500.00	
<b>TOTAL REVENUES</b>			<b>\$ 116,000.00</b>	
<b>EXPENSES</b>				
<b>Meals</b>	275			
Welcome Reception	200	\$16.00	\$ 3,200.00	
Breakfast-Thr	275	\$24.00	\$ 6,600.00	
Breakfast-Fri	275	\$24.00	\$ 6,600.00	
Luncheon-Thr	275	\$26.00	\$ 7,200.00	
Reception & Banquet	275	\$93.00	\$ 25,575.00	\$57 food, \$9 bar, \$8 munchies; facility \$16
Other Meal	275		\$ 53,880.25	food
Board Lunch	25	\$29.00	\$ 725.00	\$ 10,788.05 service
morning breaks (1)	275	\$8.00	\$ 2,200.00	\$ 5,021.09 tax
afternoon breaks (1)	275	\$8.51	\$ 2,340.25	\$ 69,889.39 food total
Food Service and Tax		\$57.52	\$ 15,819.14	\$ 253.85 plp
LAFCo 101 Lunch	90	\$25.00	\$ 2,250.00	
<b>Facility</b>	275			
A/V Set Up		\$20.95	\$ 5,780.32	
Set Up Fees		\$0.00	\$ -	
Hospitality Suite	1	\$1.62	\$ 500.00	
Exhibit Area Tables	6	\$2.18	\$ 600.00	
Internet connection	1	\$0.00	\$ -	
<b>Program</b>				
Entertainment		\$2.91	\$ 800.00	
Speaker Rooms	10	\$6.18	\$ 1,700.00	
Parking	6	\$0.73	\$ 200.00	
Thank You Gifts		\$0.73	\$ 200.00	
Honorariums		\$0.89	\$ 200.00	
Speaker Meals	25	\$7.27	\$ 2,000.00	
Attendee Gift		\$12.70	\$ 3,492.50	
<b>Supplies/Printing</b>				
Printing		\$3.64	\$ 1,000.00	
Postage		\$0.91	\$ 250.00	
Name tags/Lanyards	275	\$1.50	\$ 412.50	
Signs		\$2.91	\$ 800.00	
Supplies, Ribbons		\$1.45	\$ 400.00	
Misc		\$1.62	\$ 500.00	
<b>Mobile Workshop @ 42</b>				
Bus	42	\$12.86	\$ 540.00	
Food	45	\$25.00	\$ 1,125.00	
<b>MCLE Accreditation</b>			\$ -	
<b>TOTAL EXPENSES</b>		<b>\$351.62</b>	<b>\$ 93,489.71</b>	
<b>NET</b>			<b>\$ 22,510.29</b>	<b>19.4%</b>
<b>Credits from Previous Year</b>	6	\$ 380.00	\$ 3,120.00	
			<b>\$ 19,390.29</b>	<b>18.7%</b>

Reception				
Room rental	1.50	200	\$ 300.00	
Food	99.00	200	\$ 1,800.00	
Soda/Water	1.00	200	\$ 200.00	
Wine glass	3.00	200	\$ 600.00	
Materials	1.50	200	\$ 300.00	
Per Person	\$ 16.00		\$ 3,200.00	
Wireless Mic	1	3	\$ 150.00	\$ 450.00
Microphones				
Wed	3	\$ 45.00	\$ 135.00	
Thur	6	\$ 45.00	\$ 270.00	
Fri	2	\$ 45.00	\$ 90.00	
Speakers				
Wed	3	\$ 75.00	\$ 225.00	
Thr	7	\$ 75.00	\$ 525.00	
Fri	2	\$ 75.00	\$ 150.00	
Mixer	3	\$ 45.00	\$ 135.00	
Screen Pkg				
Wed	1	\$ 145.00	\$ 145.00	
Thur	5	\$ 145.00	\$ 725.00	
Fri	0	\$ 145	\$ -	
Main screen	3	\$ 220.00	\$ 660.00	
Essels	6	\$ 40.00	\$ 720.00	
Podium				
1	3	\$ 25.00	\$ 75.00	
5	2	\$ 15.00	\$ 150.00	
<b>Sub Total</b>			<b>\$ 4,455.00</b>	
Service Charge			\$ 891.00	
Tax			\$ 414.32	
<b>TOTAL</b>			<b>\$ 5,760.32</b>	

**APPENDIX C**  
*Sample Task Timeline*

<b>FEBRUARY</b>		<ul style="list-style-type: none"> <li>▪ Develop preliminary menus/entertainment/music</li> <li>▪ Calculate costs; set registration fee</li> <li>▪ Announce San Diego Conference in CALAFCO newsletter</li> <li>▪ Confirm Master Account credit with WESTIN</li> </ul>
<b>MARCH</b>	8	<ul style="list-style-type: none"> <li>▪ Program Committee: submits draft Program</li> </ul>
	10	<ul style="list-style-type: none"> <li>▪ Print and mail “teaser” program for August Conference</li> </ul>
<b>APRIL</b>		<ul style="list-style-type: none"> <li>▪ Design registration forms, registration system, cover letter, program cover, badges, reminder postcard</li> </ul>
<b>MAY</b>		<ul style="list-style-type: none"> <li>▪ Print mailing labels and registration materials</li> <li>▪ Begin locating sponsors for reception, etc.</li> </ul>
<b>JUNE</b>	7	<ul style="list-style-type: none"> <li>▪ Mail CALAFCO registration forms/hotel information</li> </ul>
	23	<ul style="list-style-type: none"> <li>▪ Program Committee: submit final room requirements</li> </ul>
	26	<ul style="list-style-type: none"> <li>▪ Submit final room agenda to hotel (charge occurs if rooms fall below 85% - 145 rooms)</li> <li>▪ Develop final menus</li> <li>▪ Order badges, post cards, programs, etc.</li> <li>▪ Prepare name badge as registrations are received</li> </ul>
<b>JULY</b>	7	<ul style="list-style-type: none"> <li>▪ Print and mail 30-day reminder post cards</li> <li>▪ Contact florist/balloon vendor for banquet</li> <li>▪ Get CALAFCO bank deposit slips</li> <li>▪ Get speaker ribbons</li> <li>▪ Set up schedule for staffing registration desk</li> <li>▪ Determine hotel reservations; call LAFcos who have submitted registration, but not yet made hotel reservations (5 days from room block release)</li> </ul>
<b>AUGUST</b>	1	<ul style="list-style-type: none"> <li>▪ Program Committee: submits final VIP list for parking vouchers, comp rooms, comp meals, etc.</li> </ul>
	2	<ul style="list-style-type: none"> <li>▪ Make VIP arrangements with WESTIN</li> </ul>
	7	<ul style="list-style-type: none"> <li>▪ Room-block release at WESTIN (no guarantee after today)</li> </ul>
	7	<ul style="list-style-type: none"> <li>▪ Program Committee: submits final audio-visual list</li> <li>▪ Order audio-visual from WESTIN</li> </ul>
	18	<ul style="list-style-type: none"> <li>▪ Submit final menus to WESTIN</li> </ul>
	24	<ul style="list-style-type: none"> <li>▪ Program Committee: submits final program</li> </ul>
	25	<ul style="list-style-type: none"> <li>▪ Prepare and print final program</li> </ul>
	25	<ul style="list-style-type: none"> <li>▪ Print rosters of attendees from registration information</li> </ul>
	25	<ul style="list-style-type: none"> <li>▪ Stuff registration envelopes with badges, program, rosters, restaurant info, receipts, tourist brochures</li> </ul>
	28	<ul style="list-style-type: none"> <li>▪ Submit VIP list to WESTIN</li> </ul>
	28	<ul style="list-style-type: none"> <li>▪ Calculate hotel rooms reserved and report any room-block reduction (up to 5% or 323 rooms) to WESTIN</li> </ul>
	30	<ul style="list-style-type: none"> <li>▪ Conference 10 AM – 7 PM; 170 rooms blocked at WESTIN</li> </ul>
	31	<ul style="list-style-type: none"> <li>▪ Conference 7 AM – 9 PM; 170 rooms blocked at WESTIN</li> </ul>
<b>SEPTEMBER</b>	1	<ul style="list-style-type: none"> <li>▪ Conference 8 AM - 12 PM</li> <li>▪ Master Account payable within 30 days</li> </ul>

**APPENDIX D**  
*Sample Task Timeline*

NOTE: A *Task Timeline* covers all days of the Conference.  
Only one day has been reproduced here to provide  
an example of the functions you may want to track.

START END	FUNCTION	LOCATION	SET-UP	AV	SIGNS	MENU	COST	MISC.
WED. 8/30								
10 a.m. 5 p.m.	Registration table	Santa Fe Foyer	3 banquet tables 4 chairs	2 display easels	CALAFCO Sponsors			candy bowl flowers
11 a.m. 12:30 p.m.	LAFCO 101 Lunch	California Ballroom A	U-shape	table podium/mic overhead projector screen/cart	"LAFCO orientation"	sandwich fruit ice tea	\$15.00	lunch on side table at 11:30
1-3 p.m.	Plenary session	California Ballroom B, C	classroom 4 head tables 8 chairs at tables 4 chairs at wall	floor podium/mic mic on each table Traveling mic. overhead pkg moved from Ballroom A	speaker tent-cards			water service on all tables
3-3:15 p.m.	Break	Santa Fe Foyer	stand-up			cookies coffee, tea, sodas	\$2.50 \$2.50	
3:15-5 p.m.	Plenary session	California Ballroom B, C	continued	continued	speaker tent-cards			
5-5:30 p.m.	RECESS							
5:30p.m. 7:00 p.m.	Reception	Library and Lounge	low and high cocktail rounds chairs		CALAFCO Sponsors	hors d'oeuvre s 2 call brand drinks @4.25	\$22.00 \$ 8.50	flowers from registratio n table

## SPEAKER CONFIRMATION CALAFCO Annual Conference

Name and Title:	Session Day and Time:
Organization: Local Government Commission	Session Title: Description:
Address:	
Phone:	
Fax:	
Cell Phone:	
Email:	

### INSTRUCTIONS

1. **Please return this form ASAP** to the address below with any corrections. *This is how it will appear in the program.*
2. **By August 5, 200\_** – e-mail (preferred) or mail a disk/CD with your presentation (if using powerpoint) and handout or supplemental reading materials in either PowerPoint or Word to the address below.
3. **By August 5, 200\_** – Please e-mail or mail us a brief biography of your professional background.

### AUDIO VISUAL NEEDS

The session room will be set up with a lectern, microphone, a data projector with cable, and a screen. If you will be using this equipment, please bring your laptop computer and a copy of your presentation on a disk/CD or portable data storage USB device. Please check if you will need any of the following items:

- |  |  |   |
|--|--|---|
| <input type="checkbox"/> Hand-Held Microphone            | <input type="checkbox"/> Wireless Microphone | <input type="checkbox"/> Overhead Projector |
| <input type="checkbox"/> VCR (VHS format) or DVD/Monitor | <input type="checkbox"/> Flip Chart          | <input type="checkbox"/> Other: _____       |

### TAPING AND COPYRIGHT PERMISSION

Conference presentations and written materials constitute an important element of CALAFCO’s education program. Time and budget constraints may keep officials from attending CALAFCO events. As a result, we may offer the materials provided at the conference in a variety of formats to attendees and non-attendees alike:

- **Written Material Distribution.** Written materials may be made available including but not limited to the following distribution methods: through CALAFCO website, on CD, or shared in email discussion groups.

### SPEAKER ACKNOWLEDGEMENT & PERMISSION

My signature below warrants that the materials I have provided for program handouts do not violate any copyright or other proprietary rights of others; that the materials are my own original work; and that I assign to the California Association of Local Agency Formation Commissions a nonexclusive copyright in the material for purposes of reproducing or distributing the materials in any format to members. I hereby authorize CALAFCO to photograph, film or make a recording of my presentation and I understand that any photograph, film or recording of my presentation may be used, reproduced and/or made available to CALAFCO members.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

### A WORD ABOUT OUR AUDIENCE

Our audience consists primarily of LAFCo Commissioners and staff. Commissioners include elected officials from county boards of supervisors, city councils, and special district boards of directors, as well as appointed public members. They seek practical information, ideas, skills and resources they can take home and use. For handout materials, plan on 300 copies for general sessions and 75 copies for concurrent sessions.



## CALAFCO 2007 Annual Conference EVALUATION

Thank you for attending the 2007 annual conference. The planning committee, staff and the Board appreciate your feedback on this conference. It will help us continue to improve!

Please check the appropriate box to describe yourself:

Commissioner    LAFCo Staff    Associate member/sponsor    Other Agency staff    Guest

Please use a scale of 1-6, with **1 = Poor** and **6 = Outstanding**, to respond to each of the following:

- |                          |       |                              |       |
|--------------------------|-------|------------------------------|-------|
| 1. Meeting Facilities    | _____ | 4. Preconference Information | _____ |
| 2. Location (Sacramento) | _____ | 5. Awards Banquet            | _____ |
| 3. Food Quality          | _____ | 6. Conference Materials      | _____ |

Please tell us about the quality and content of the sessions you attended, using the same 1-6 scale.

	QUALITY	CONTENT
7. <i>Pre Session: Mobile Workshop</i>	_____	_____
8. <i>Pre Session: LAFCo 101</i>	_____	_____
9. <i>Pre Session: Water Determinations</i>	_____	_____
10. <i>General Session 1: Lessons on Sustainability – Butte LAFCo</i>	_____	_____
11. <i>General Session 2: Lessons from San Joaquin Valley</i>	_____	_____
12. CALAFCO Awards Banquet	_____	_____
13. Concurrent Sessions ( <i>please indicate the sessions you attended</i> )		
Thursday, 10:30 _____	_____	_____
Thursday, 1:45 _____	_____	_____
Thursday, 3:15 _____	_____	_____
14. William Fulton Keynote Address at Luncheon	_____	_____
15. Friday Breakfast Forums	_____	_____
16. <i>General Session 3: Sustaining Agriculture: Exploring LAFCo's Role</i>	_____	_____
17. Legislation Update	_____	_____

Overall Rating of the Conference: \_\_\_\_\_ Was this time well-spent for you? \_\_\_\_\_

Two things you really liked:

\_\_\_\_\_

Two things that need to change:

\_\_\_\_\_

Comments: \_\_\_\_\_

\_\_\_\_\_

*Thank you for your feedback!*



## 2009 Annual Conference REQUEST FOR PROPOSALS

### The Organization

The California Association of Local Agency Formation Commissions is a non-profit statewide association which provides educational and technical assistance to its member agencies and associate members. The member agencies include 56 Local Agency Formation Commissions (or LAFCo) in each county. Among its major duties, LAFCo is responsible for the creation or changes in boundaries of local governments, such as cities and special districts. In addition LAFCos review the effectiveness of municipal services and authorize special district services. Each LAFCo is an independent state agency and governed by a five to nine member Commission. Commissioners are elected officials and public members appoint to LAFCo, and include county supervisors, city council members, special district board members, and a public member. Each LAFCo has a staff comprised of an executive officer, clerk, analysts, and legal counsel.

There are approximately 700 LAFCo commissioners and staff in the state. In addition to the LAFCo members, CALAFCO also has associate members which include businesses, agencies, and individuals who support the educational mission of the association and the goals and work of the LAFCos. CALAFCO was founded in 1971 and has offices in Sacramento at 801 12<sup>th</sup> Street. The Association sponsors two major conferences each year. A staff workshop is held in the spring; and an annual conference in the fall.

### Annual Conference Format and Meals

The annual conference is a three-day educational event, featuring general sessions, concurrent sessions, luncheon, business meeting, theme dinner, and an awards banquet. Typically the event begins mid-morning on a Wednesday and concludes at noon on Friday. General sessions and a series of three concurrent sessions (with up to five breakouts) are scheduled during this time.

The luncheon is on Thursday, and the major evening dinner and event is on Wednesday. We also have several smaller events before and after the main conference, including an opening reception on Tuesday and a Board lunch and meeting on Friday afternoon. Additional meal service will include buffet breakfasts on Thursday and Friday, and breaks on Wednesday and Thursday afternoons.

We require a small exhibit area, typically for 15 tables. Our exhibits are limited to tabletops, some of which require electrical connections. A registration area is also required, along with a conference 'office' area with locked storage.

## Attendance

Our typical conference attendance ranges from 260-300 participants. We are anticipating 2009 will be at the higher end of the range. Lodging is typically in the range of 400 room nights with the majority on Wednesday and Thursday evenings. Many participants do arrive earlier or stay later, so we would like to be able to extend the conference room rate from Tuesday through Sunday.

## Facility Needs

The attached program provides the typical format for the conference. Facility needs include:

- ◆ General sessions: all participants set up theater style with tables (300 people)
- ◆ Breakout sessions: up to five at a time in theater style with or without tables depending on space (30-75 people)
- ◆ Luncheon (1): rounds (300 people)
- ◆ Dinner (2): rounds with cash bar. One night a “theme” dinner; second night awards banquet with head table and podium (300 people)
- ◆ Boardroom on Friday afternoon (20 people)
- ◆ Registration area: throughout conference
- ◆ Exhibit area: Wednesday and Thursday (15 tables)
- ◆ Office area: Tuesday-Friday
- ◆ Hospitality suite: Tuesday and Wednesday

## Desired Dates

Tuesday – Friday, the week before or after Labor Day

## Previous Conferences

2007 Hyatt Regency Capitol Park (August, 2007)  
2006 Westin Horton Plaza, San Diego (September 2006)  
2005 Portola Plaza Hotel, Monterey (September, 2005)  
2004 Disney Grand Californian, Anaheim  
2003 Crowne Plaza Hotel, San Francisco  
2002 Fess Parker Doubletree Resort, Santa Barbara  
2001 Tenaya Lodge, Mariposa County  
2000 Westin Horton Plaza, San Diego

## Contact

CALAFCO Executive Director

William Chiat – 916/442-6536

California Association of Local Agency Formation Commissions

801 12<sup>th</sup> Street, Suite 611

Sacramento, CA 95814