

# UURMaPA CONFERENCE PLANNING GUIDELINES

Sept. 2017 – G. Luke and J. Gibson

The UURMaPA Board thanks you for being involved in planning a local or regional conference. We hope these guidelines will be helpful, easing the planning and resulting in an organized, inspirational, and overall successful conference.

**AREA CONFERENCES** Conferences may be scheduled anywhere and anytime. They may be multi-day meetings or one day gatherings. Their object is to bring people together. Any member is welcome at any conference.

**BOARD CONTACTS** Two UURMaPA Board members will be useful to you: the member carrying the Conferences portfolio (your Board Liaison) and the Treasurer. Find them both on the Board of Directors page at <http://uurmapa.org/governance/>.

**HOW TO BEGIN** Create a planning team and allocate the essential areas of responsibility. Try to include a partner on the team, and at least one member with experience from a previous conference. (In many cases one or two persons can perform all the roles):

**Program and worship**—plan the program (program for the Winter conference is planned by the Board), secure appropriate talent, recruit worship leaders and recommend to the Board suggestions for the Odyssey presenter

**Hospitality**—purchase, have delivered, and serve social hour refreshments, such as snacks, soft drinks, beer, and wine, and M&Ms and fruit such as apples or tangerines for availability during the program sessions. (Note: one or two chaplains might be named, to deal with sudden concerns.)

**Administration**—This function may include:

A **Registrar**—create the registration form, sign up the folks, track any cancellation vacancies and wait list placements, collect the checks, prepare the conference packet. Be aware of the maximum number of participants which can be handled by the conference site. Record date registrations are received. If the maximum is met, inform later registrants that they will be placed on a waiting list.

An **Arrangements Person** deal with the conference center in determining the number of rooms needed, the special needs in those rooms, the assignment of rooms, dietary needs, check-in and check-out times, problems during the event and the evaluation forms. This person could also be the liaison to the conference center during the conference.

**Publicity**—responsible for communication to Elderberries, UURMaPA Announce, and conference information for the UURMaPA website.

Emails and audio or video conference calls can facilitate committee business.

**SELECT A SITE** Work with one or more conference centers or a local UU church to arrange for the date and site. This choice of site should be reviewed by the Board before being announced publically.

**CONFERENCE FINANCES** Determine the registration fee sufficient to cover the costs of meals and space rental, if any, (for one-day meetings) or (for overnight or longer conferences) room and board, hospitality, and program, including possible expenses for speakers: honorarium, travel, and meals or room and board as well as conference organizers expenses. Set a registration deadline at least two weeks before the event. All conferences are expected to be self-supporting, though; conference planners are encouraged to apply to the UURMaPA Board for program grants through the Board liaison if special programming funds might be needed. Temporary advances to cover conference expenses may be requested from the UURMaPA treasurer.

**HONORARIUMS AND FEES** Keynote conference presenters should be offered an honorarium or fee. Outside experts may rely on fees for income. In some cases, as with a member of UURMaPA, the fee may be refused (though often a gift card has then been given). A reasonable guideline to keep in mind would be \$250-\$1500, which could be covered by registration fees. There is the option of the Board subsidizing a larger amount in special cases.

The following wording was suggested by the Board for discussing honoraria with potential presenters: “We are prepared to offer an honorarium, and pay your expenses as needed. How much would be your fee for what we are asking you to do in this conference?”

**CONFERENCE BOOKKEEPING** The registrar should forward registration checks as they are received to the UURMaPA treasurer for deposit. Receipts for copying and mailing expenses, etc. will be paid promptly after being received by the UURMaPA treasurer. Up to two conference organizers (or the equivalent) will have their room, board and registration covered by UURMaPA.

**PARTICIPANT FINANCES** UURMaPA members, both clergy and partners, may request financial assistance. Direct such requests to the UURMaPA treasurer. Requests should include the amount of assistance that one needs, including costs for travel, caregiver for a dependent partner, etc. in addition to the registration fee.

**PUBLICITY** Let your conference be known! The following media are at your service:

*Elderberries*, our quarterly newsletter (see current board roster at <http://uurmapa.org/governance/> for editor’s name and contact information.) Deadlines are the 15th of January, April, July and October, for publication on the first of the next month. Furnish complete, concise information. Allow for announcements and a registration form in each *Elderberries*. The recent practice is that the Fall conference announcement and registration form are included in the Spring and Summer issues, and the Winter conference announcement and registration form are included in the Fall issue.

*UURMaPA-Announce*, our Board-to-members e-mail source. Furnish an e-mail-ready message to the Board secretary at [secretary@uurmapa.org](mailto:secretary@uurmapa.org) (or see Board roster for contact information).

*The UURMaPA Website* <http://www.uurmapa.org> Ask the Board liaison how to get information placed on the website.

*The UURMaPA Directory.* Target all members in your vicinity by making use of the comprehensive list by Caring Area in the back. Request mailing labels and/or email lists from our database keeper, ([membership@uurmapa.org](mailto:membership@uurmapa.org)) . Our most recent retirees are listed in each issue of *Elderberries*.

**REGISTRATION FORM** Include the following:

1. Dates, times, location, topic or theme (if there is one) and registration deadline.
2. Names and contact information for organizers
3. Names, contact information and special needs of all registrants, including partners.
4. The registration fee due in full with registration unless otherwise arranged with UURMaPA treasurer.
5. To whom the check is to be written and where it is to be sent.
6. Cancellation policy: In case of cancellation by registrants, UURMaPA will do our best to refund as much of the fee as possible. Some costs may be nonrefundable. If place(s) can be filled from a waiting list, a full refund may be made. (*passed by the Board 2/25/17*)
7. When on-line payment becomes possible, explain how to use it.
8. Encouragement to members with limited resources—retired ministers and partners both--to apply to treasurer for assistance or scholarships
9. Request for mail preference for further information: e-mail or snail mail.
10. Site address for GPS, and driving directions from a nearby interstate highway, plus a map-
11. Site information for family use in an emergency: mail and email addresses and phone number.

**NOTIFICATION OF LOCAL MINISTERS** If a conference is held at a UU congregation, its minister(s) must be notified as arrangements are being made. It is gracious to invite the minister to bring greetings to the conference. Local ministers can be helpful with information about the community, possible programs available, or individuals who can contribute to the richness of the conference.

**UPON ARRIVAL** (For special notes on one-day conferences, see below) Be sure to have a designated greeter or two, and furnish each new arrival with an information packet including a name tag, his/her room number and a map of the facility, a schedule, a roster of participants, helpful information about the local area, and an evaluation form to be completed before participants depart. Include the address and phone number of the nearby hospital, the location of a 24-hr. phone in the facility, and the reminder to dial 911 in the case of a medical or security emergency.

**PROGRAM** A program pattern has developed over the years. Some elements include:

1. personal sharing the first evening;

2. regular worship services, one of which should include “In Memoriam,” a reading of the names of members (including partners) who died during the preceding year. This can be obtained through the board liaison. Connections Chair(s) have responsibility for preparing this.
3. business meeting and news from the UURMaPA Board;
4. the major program;
5. an Odyssey, from an individual clergy or partner, or a couple
6. a field trip to a local museum or nature center;
7. free time for conversation;
8. social time, before dinner. If such time features libations, be sure to include non-alcoholic beverages as well.

## **SUGGESTED GUIDELINES FOR CHOOSING ODYSSEY PRESENTERS**

1. Review list of previous presenters at this conference or others (The Board liaison can provide such a list.)
2. Poll local area people to ask whom they want to hear
3. Give several suggestions to the Board liaison, who will present suggestions to the Board for review.
4. In consultation with the Board and the planning teams, the Board President will select and invite all Odyssey presenters for all UURMaPA Conferences. The Board President may delegate the invitation.
5. The Board President will inform the conference organizers as soon as an Odyssey presenter has accepted the invitation.

**HOSPITALITY** Good wine and good snacks oil the social hour gears. And tablecloths, even if plastic, seem to help those present feel cared for. (The Board liaison has a list of quantities used in the past.) The Attleboro conference has a long tradition of providing member-authors with space to market their wares.

**PASTORAL CARE** Assign someone to provide and mail greeting cards for all to sign, wishing absent previous attendees well and conveying condolences. Recruit and announce at least one person to act as a Conference Chaplain should someone need one.

**END OF CONFERENCE** If possible, choose a date and a committee for next year. If returning to the same site, try to make arrangements for the next year’s dates before you depart. Give participants five or ten minutes to complete the evaluation form. Immediately after the conference, prepare a written report on the conference, including a financial statement (the Treasurer should be able to provide this for you.). Send the report to Board liaison as well as to the organizer of the next planning committee.

Send thank-yous to all the team, the odyssey presenter, worship leaders, program presenter and anyone else who helped you.

Be sure to send any reimbursement needs to the treasurer promptly.

Included at the end of this document is a suggested time line for the Fall conference created by Carol Taylor in 2014.

ONE-DAY CONFERENCES/GATHERINGS For one day gatherings, one or two persons can often handle the planning and logistical tasks. A UU church with a pleasant, inexpensive restaurant nearby is often an ideal locale . A conference or retreat center is another possibility. Registration forms may or may not be needed but you will need to request some form of RSVP (snail mail, e-mail, telephone) from those planning to attend. For some one day gatherings, advance registration fees may be needed (to make sure costs will be covered), thus requiring a registration form. Simple morning refreshments as folks arrive and lunch and dinner (if the meeting lasts into the evening

THANK YOU FOR MAKING THE UURMaPA CONFERENCES POSSIBLE.

ADMINISTRATIVE CALENDAR  
for use by  
Planners of the UURMaPA Fall Conferences

There are five primary areas related to planning the fall conference: Program, Worship, Hospitality, PR, Administration.

NOVEMBER

*Between the end of the last conference and November first thank you notes have been written to all who volunteered at the conference and financial records have been completed.*

- I. Conversation with the Board Liaison (there may be others involved) to determine the theme/topic/focus of the program for the conference
- II. Go through evaluations - what to incorporate in the next conference?

DECEMBER

- I. Board Liaison takes decision to the Board via board's monthly conference call.
- II. Decision is made by conference co-chairs

JANUARY

- I. Conference Planners begin recruiting speaker(s)/leaders for the program
- II. Conference Planners prepare simple announcement for Elderberries (deadline is January 15th) that includes dates, location, theme.
- III. By the end of January a draft schedule for conference done - sent to Board Liaison.

- IV. Request Board Liaison take suggestions from evaluations to the Board via their conference call for comment, etc.

## FEBRUARY

- I. Theme/topic/focus is in place
- II. Cost to the individual is determined between Board and Conference Planners (overnight & commuters)
- III. Email Blast #1 sent out (includes dates, location, theme, speaker, cost)
- IV. Begin a process between Conference Planners and Board of determining who will be the Odyssey speaker
- V. A list is created and Conference Planners make the final decision.
- VI. Review draft schedule -- still good? -- make changes?

## MARCH

- I. Begin recruiting Worship Leaders for three services (Necrology service -first evening, Theme/Topic Service - first morning, and Closing Service -last morning).
- II. Have Worship leaders in place by the end of this month or next month.
- III. Begin process of finding a paid musician to work with the worship leaders (the Board Liaison get approval from the Board for this expense)
- IV. Begin finding volunteers to do Hospitality (a team of five works well). It helps if these people live in the general area of the conference.
- V. Begin to consider what kinds of programming to consider beyond the theme/topic of the conference.
- VI. Once a decision is made, begin recruiting volunteer facilitators
- VII. Prepare Email Blast #2 to go out end of March or very early in April

## APRIL

- I. Registration form set - if it is done before Email Blast #2, goes out with the Email Blast #2 (focus on theme/speaker and worship leaders)
- II. Compose article for Elderberries. Article and Registration form go to Elderberries Editor - Deadline is April 15
- III. Finalize the conference schedule and send to Board Liaison
- IV. Musician in place. Be sure s/he has hymnals for practicing.
- V.
- VI. Send "information letter" to worship leaders and musician.
- VII. Check in with the Odyssey speaker. Who does that person want to introduce her/him? Who will do the asking - Odyssey speaker or conference planner? What are the speaker's needs?

- VIII. As registrations come in they need to be recorded and money needs to go to the treasurer.
- IX. Determine “Special Attractions” (Book Sale Table, Arts & Crafts Table, Write a note Table, others?)

#### MAY

- I. Confirmation letters go out with conference schedule on back side and directions included (in the past, these have gone out as soon as the registrations come in)
- II. Make first contact with LaSalette Administrator, Charlotte (sometimes I do this in April). Primarily, as conference planner, I want to confirm what is in the contract with the Retreat Center to make sure we are on the same page. The treasurer gives the conference planners a copy of the contract with the Retreat Center.
- III. Confirm the Hospitality Team. Send an email letter to all of them. Reassure them that the conference planners will be in touch with them about what to purchase and that they will, of course, be reimbursed. Please keep their receipts. (up to this point 2 have purchased the liquid refreshments and two have purchased the munchies - a 5th person is there as a helper during the conference) Ellen Brandenburg is holding all of the serving trays, etc. In the past two years we have been more intentional about how much to buy. Susan Weston has been very helpful with the liquid purchases and Ellen and Sylvia Howe have been helpful with the munchies purchases.
- IV. This is a good time to determine if the Board is going to meet at the Retreat Center, do they want the conference planners to be handling the administrative aspects of their time at the Retreat Center (room assignments, meals, social hours, etc.) This year we did the administrative piece for the Board. Again go to the Board Liaison and ask that this decision be made at their monthly conference call.

#### JUNE

- I. Email Blast #3 goes out in early June with registration and an emphasis on some of the details that have not been mentioned up to this point (programming, special attractions, etc.)
- II. This month we have done a lot of administrative stuff: how to do name tags, up-to-date registration list, use packets or not, what will go in the packets, how to get a chalice from the area or one of the worship leaders, etc.

#### JULY

- I. Prepare final article for the Elderberries and send it to the Editor. The deadline is July 15th.
- II. Process Registrations as they come in
- III. Keep Registration list up-to-date

#### AUGUST

- I. In late August the conference planner makes contact with the speaker, worship leaders, program leaders/facilitators to ask what their needs will be.
- II. The conference planners contact the Retreat Center Administrator to ask about deadline(s) for Room Assignment list(s). If the conference planners have agreed to do the administrative piece for the Board, there will be two deadlines (these deadlines are usually 2 weeks before the day the group arrives at the Retreat Center). The administrator will send the forms to the conference planners.
- III. Put the files in order to pass on to the next conference planners.
- IV. Prepare Email Blast #4 to go out mid-August

#### SEPTEMBER

- I. Details, details, details ----- check in with the speaker/panelists, etc., the worship leaders and musician, the program facilitators/leaders, and anyone else who is doing anything for the conference.
- II. Prepare last Email Blast #5 to go out after Labor Day Weekend.
- III. Work on room assignment list(s)
- IV. Send to Charlotte, Retreat Center Administrator by deadline.
- V. Make name tags and put in holders
- VI. Run off materials for packets.
- VII. Assemble packers.
- VIII. Pack up materials & supplies that will go to the Conference.
- IX. The conference planners have telephone conversations about quantity of liquid refreshments and munchies to purchase to those people doing the buying
- X. Send a “table & chairs set-up” for each room used by the conference the same time that the room assignments are sent.
- XI. From the registration list pick a person to sit at the Registration Table on arrival day of the conference

10/2014  
Carol Taylor