

WASHINGTON STATE ASSOCIATION OF COUNTY TREASURERS

ANNUAL CONFERENCE HANDBOOK

Updated January 2023

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SECTION I: BIDDING TO HOST A CONFERENCE

WHAT DO I NEED TO KNOW ABOUT REQUESTING TO BE THE HOST OF AN ANNUAL CONFERENCE?

WHEN AM I ELIGIBLE TO HOST A CONFERENCE?

It is the policy of the Association to rotate the conference from East side to West side counties each year. The regions identified in the by-laws of the Association are used to determine if your county is East versus West. The Association may choose to hold the conference in a central location of the state for multiple years to allow for a reduction of conference costs and to improve accessibility for all members. This also allows for more certainty for what to expect at a location. The annual conference is generally held the third week in June to best fit the work flows of the Treasurer's offices. However, depending on conference location availability, the annual conference may be held any time in June.

Two or three years prior, at a business meeting of the full membership, the President of the Association will include an agenda item requesting a call for the bid of a given year's annual conference. Generally, this is done at the June conference. However, the item may be deferred to the next general membership meeting. Per the bylaws, the full membership will vote on the host site to use.

WHAT INFORMATION SHOULD I PRESENT WHEN I BID TO HOST?

The Association encourages you to have a facility in mind with a reasonable estimate of the nightly room cost when you make your bid. Typically, room rates should be consistent with OFM rates. The Executive Board may approve a higher rate. We encourage you to supply handout material such as brochures of the hotel, activity locations, golf courses, etc. at the time you bid. This kind of information enhances your chance of winning the bid when there is competition.

You are encouraged to consider your office's workload, whether it is an election year, and whether you will have the ability to perform the many conference duties. You may wish to solicit help from neighboring County Treasurers. Since smaller counties may not be able to host a conference individually, this is an opportunity to contribute.

WILL THERE BE ANYONE TO HELP ME?

It may make sense to co-host the annual conference with other counties. Before submitting your bid, check with surrounding county treasurers to see if they would be willing to co-host. If your bid is selected, you automatically become the Chair of the Conference Committee for the year of your conference. The other members of the committee consist of: 1) last year's host, 2) this year's Treasurer, 3) the Association President for the year of your conference, and 4) the Education Committee Chair 5) Co-hosting counties. Last year's host will provide recent experience and knowledge to assist you with your timeline and all other conference details. The President will be the

source of answers for questions not covered here and will be involved in every aspect of the conference you will be hosting. The President can help you decide when it is necessary to contact the Executive Board for consultation. The Education Chair will be selecting the education topics and instructors for your conference. The Association Treasurer will be your contact for coordinating payment of conference costs. Conference calls are a helpful, efficient means of maintaining a good level of communication. The committee may want to tour the hotel and see the meeting rooms prior to you signing a contract with the hotel.

SECTION II: HOST

POLICIES, PROCEDURES, INFORMATION & GUIDELINES

Congratulations on being awarded the opportunity to host the upcoming WSACT Conference. We want to thank you for taking the time to bid on the event. Hosting a conference is a lot of hard work. However, we are sure you will find it an exciting and fulfilling experience for you and your staff. We wish you all the best in your endeavor.

BEFORE YOU BEGIN: SOME IMPORTANT INFORMATION

WHAT IS THE PURPOSE OF THE WSACT CONFERENCE?

WSACT is a non-profit organization established to provide education and peer support for County Treasurers in carrying out their statutory duties. The purpose of the WSACT Conference is to provide a platform for networking, communicating, and educating our members and their staff. The focus of the conference is on education, legislation and communication. It also allows us to make contacts with individuals from industries relevant to our operations. The conference also is used to keep Treasurers updated on legislative and legal issues that arise in other Washington State counties and at the state and federal levels.

The main components of the conference are: 1) Opening ceremonies, 2) Out-going President's reception, 3) Education sessions, 4) Treasurers Business Meeting, and 5) Banquet. You may want to add opportunities for educational or entertainment pre-conference events, as well as user group meeting opportunities. Entertainment events are not part of the official conference and must be kept financially separate. Public funds cannot be used for that type of activity.

We do not allow vendors or individuals within the industry to use meeting times to solicit business. They may be asked to provide education opportunities, if it fits our education mission. Vendors may, however, pay to have display tables and or sponsor events at the conference site for the purpose of soliciting business for their products and services.

WHAT RESOURCES ARE AVAILABLE?

A budget is established every year for the conference. You have the authority to spend within that budget. The Executive Board must approve additional expenditures. You will have to set registration amounts based on estimates and there is no way to precisely predict attendance. Thus, the Association expects that some conferences will result in a net loss and some in a gain. We simply ask that you do your best to balance revenues and expenses.

Under the by-laws, you have the authority to contract for conference-related services (such as the hotel and entertainment). You will need to coordinate with the Association Treasurer regarding payment for any costs you incur.

In addition to the knowledge and experience of the Conference Committee, you will be given data from the previous conferences to help you with meal counts, sponsors, historical costs, etc.

Your local Convention and Visitors Bureau, Chamber of Commerce or Economic Development Council can be very helpful identifying resources, service companies, and other vendors that provide the types of services you will need for the conference.

I HAVE THE BID, HOW DO I BEGIN?

As with any big project, you will need to determine what is required to successfully complete the project. You will do this by researching past conferences. Then, you will be ready to start researching what resources are available to you. Your first commitment will be contracting for the hotel site. As soon as you have enough information to know what to negotiate, you will want to secure the site.

Gather Historical Information on Prior Conferences:

- 1) The current Association President, previous Host, or Past-President can help you obtain statistical data from previous conferences to aide in making estimates and decisions as you go through this process. The headcounts from the previous conferences will help you estimate meal counts and the number of rooms to block. This information will be necessary when negotiating with the hotel and recommending the registration fee. Refer to Section III for historical attendance including Treasurers, vendors and guests.
- 2) The Education Committee Chair will help you to identify the number, size and layout of meeting rooms to reserve in the hotel for the training sessions.
- 3) It is helpful to find out what type of banquet entertainment, meals, and President's Receptions have been successful in the past. It is always nice to use resources from your region.
- 4) The historical data will also provide you with insight into meal scheduling. We tend to provide certain meals on certain days and not on others. Some conference days are better attended (i.e. days that contain educational

sessions). The data will help you identify patterns. Many small County Treasurers cannot be away from the office for the whole week because of backup staff concerns.

Contact the prior year's conference host for the most updated vendor contact information. The information will help you estimate how much sponsor money you can expect to help with your budget. Sponsorship money keeps registration rates affordable for the small counties. It will be up to you to identify potential sponsors and provide contact information.

Firm up the Hotel Site:

- 1) Most likely, you identified a hotel site prior to the bid. Historically, we have found that the hotel should be reserved as early as possible to ensure its availability. Many hosts have found that the best facilities are booked for two and three years in advance. There are circumstances when you may need to change the site. If so, work with the President to determine if you will need approval from the Executive Board. The Board may want to call for a full vote of the body if the change would be significant.
- 2) As stated above, the host has the authority in the by-laws to negotiate with the hotel and sign any necessary contracts or letters of agreement. The hotel you pick will necessitate how detailed you will need to be with your negotiations. You will need to address such items as audio/visual equipment and a suitable registration area. We recommend, however, that prior to signing the contract, you allow your Conference Committee to review it to see if the terms seem appropriate in comparison to previous years. This is especially true if this is your first time as Host.
- 3) Obtain menu and menu prices from the hotel prior to signing any agreements, if possible. At the very least, get sample menus and prices. This is one of the main components of the cost of your conference, and thus, in setting the registration fee.
- 4) Negotiate the cost of a vendor area and tables. The Vendor area should be located as close to the meeting rooms as is possible, given the hotel floor plan. Vendors will need adequate power and the area should have an appropriate appearance.

Begin Determining the Meal and/or Meeting Room Costs of Your Conference:

- 5) The hotel's event revenue comes from the meals provided at the conference. Whenever, possible, meeting rooms plus (two) guest rooms (for the President and Host) are provided by the hotel at no cost. Include a hospitality suite as part of the rooms included in the contract. These should be part of your negotiations. If these rooms are not provided at no cost by the hotel, then they should be included in your conference budget.
- 6) A hospitality suite is an opportunity for attendees to network and learn from each other in a relaxed environment without an agenda. The Association will pay for the room and food as part of the conference budget. Alcoholic beverages shall

not be paid for by WSACT dues or registration fees. **Since alcoholic beverages cannot be paid for with Association dues**, donations may be accepted from attendees or from the pool of vendor sponsorships. The conference host shall make sure a room is available for the hospitality suite. We recommend the suite has a suitable floor plan and location to allow for evening festivities. The President of the Association will host the hospitality suite and will make arrangements for supplying food and beverages. The President will either do this personally or arrange for volunteers to do this. If the hospitality suite is sponsored by a vendor(s), the hospitality room and all expenses associated with such are the sole responsibility of the vendor. The vendor sponsoring such hospitality suite in such cases will be the host.

- 7) You will need to coordinate with the Association Treasurer to pay any bills you may incur related to your conference. There are several ways you can do this: 1) send the bill to the Association Treasurer to pay the vendor directly, 2) request a petty cash fund for miscellaneous expenses (work with the Association President and Treasurer when requesting money to cover miscellaneous costs during the conference), or 3) pay the expenses yourself and turn in an expense report (with receipt documentation) to the Association Treasurer for reimbursement. Be sure to let the Association Treasurer know how you want to handle conference disbursements so that they can help you stay within the Association bylaws and policies.
- 8) Keep records of all expenses incurred during the conference and include them in a spreadsheet. This information will be used to balance your records to the Association Treasurer's records. The Association Treasurer will send you a list or spreadsheet of paid and unpaid registrants, both WSACT members and sponsors. This spreadsheet needs to be updated to reflect online registrations and sponsorship funds received. You should retain a copy of any receipt you forward to the Association Treasurer for payment. You will use the information to track who has registered and to confirm that the payments made are consistent with what you agreed upon with various agencies.
- 9) Registration and Lodging will be covered by WSACT for the Conference Host(s) (if two counties co-hosting). Additionally, up to three registrations will be covered for staff helping to run the conference.

NINE TO TWELVE MONTHS BEFORE YOUR CONFERENCE:

Begin researching the availability and costs for Guest Speakers, Banquet Entertainment, Caterers, Reception Sites, Golf Sites, and Potential Sponsors:

- 1) One of the main events of the conference is a banquet where the out-going President recognizes their board and formally introduces the in-coming President and the new Executive Board. The banquet has generally been held at the conference hotel with dinner and evening entertainment included. In the past, the entertainment has included dance bands, comedians, variety type shows, and dinner plays. We have attempted to use local talent to support the host area. If you have a Convention Bureau or Chamber of Commerce, you could use them as a source for this information.

- 2) The conference includes a President's Reception hosted by the out-going President. This is usually scheduled for Tuesday or Wednesday evening. It generally includes hors d'oeuvres and a no-host bar. Often, this reception has been on cruises, in local museums, wineries, gardens, or some other special location within the area but away from the site hotel. Remember that transportation must be arranged if you select an off-site location. Remember to send a letter to any unselected caterer, reception site/event location contact, etc. (see sample #11).
- 3) Pre-conference entertainment: In past years we had a golf tournament in conjunction with the conference. Since the participants must use their own funds to pay for this, we recommend that you use a totally separate registration form for the golf event. If you or your staff don't know anything about golf tournaments, and would like another Treasurer to organize this event, the President or Conference Committee can assist you in finding someone. We recommend that you or your designated organizer, begin looking for a golf course fairly early. We also recommend that you do not use a course that costs significantly more than the public courses without soliciting the informal approval of the golfing members. The Conference Host determines the day that the golf tournament will be held. However, we suggest that you poll the membership to identify what day the members prefer. In past years, the tournament was held on Monday or Wednesday.

Remember: The golf tournament is not officially part of the conference and monies cannot be commingled with Treasurers' Association or conference registration monies.

The tournament must pay for any greens fees, prizes, and other miscellaneous expenses related to the tournament. The money to cover these expenses must come from the golf registration fee you set and any direct sponsorship you might obtain. The checks for registration fees will come to you or your golf organizer to be handled separately. You can decide if you want to open a separate account for this function or use your own personal account.

The primary cost of the tournament is the course greens fees. Most courses will require payment in advance for reserving a large block of tee times. We recommend that you set the golf registration fees to cover those and all other expenditures and then pay the golf course directly. By handling it that way, your advance payment will be covered should there be last minute no-shows.

The tournament organizer generally solicits prizes to award at the end of the tournament. Some sponsors like to donate golf prizes and some like to simply designate their donation to the golf tournament. If so, their donations will be handled by the golf organizer separately along with the tournament fees. A sample registration form is included in this handbook (see sample #6).

- 4) Sponsorships/Vendor registrations generally provide one-half or more of the conference costs, which in turn, minimizes the cost of member registrations. This can be especially important for the small counties that usually have extremely tight travel budgets. You will need to determine your sponsorship and vendor

registration structure early, so that you may begin soliciting contributions as soon as possible. You cannot set Association membership registration until you have a good estimate of your costs and sponsorship revenues. Generally, the Host contacts individuals and institutions that have donated in the past to request continued support. This information will be included in the historical data that you will receive.

It is recommended that sponsorships are not specific to a particular event to avoid any appearance of conflict of interest. This could be especially true of the President's reception. However, it may make sense to provide the opportunity for specific sponsorships, such as conference breaks, pre-conference activities (i.e. golf tournament, dinner) or hospitality suite. Check with your President about their personal comfort level in regards to these opportunities. There are varying opinions among the Treasurers about this issue.

We have been including sponsorship registration(s) with specific levels of sponsorship. You should be sure the Executive Board approves of how you structure this. Using the prior year's sponsorship information will be helpful in this process. Full sponsorship registration should cover the same meals and events that the members' registration covers and be set at the true cost of the meals and events provided during the conference. Partial registration fees for sponsors should be charged at the cost of the meals and/or events that they are registering to attend.

Part of your hotel contract will include the price the hotel will charge for vendor tables, setup, etc. Your Sponsor/Vendor registration should include a fee for this option. The fee should, at the very least, cover the cost to the Association. If vendors want to participate in the education and attend the meals, they will need to register separate from the vendor fee. They, like the sponsor, should cover the total cost of their meals and their proportionate share of the events. It works well when sponsor / vendor registrations and conference letters are mailed out fairly early (see samples #2 & 4). The earlier you receive sponsor/vendor money, the better idea you'll have about how much revenue you will need from Association members and their staff. Also, be sure to include the miscellaneous information included in the membership registration packet (see samples #2, 4, 5-7).

We recommend that you begin contacting potential sponsors in the fall preceding your conference. Some sponsors need to budget for the conference expense and plan early. Major sponsors should be called personally to request their support. After they commit to sponsorship, mail a reminder letter to them by February (see samples #8 or 9). Other sponsors should be contacted by mail or called no later than January. We also recommend that you follow up with a similar letter or phone call in early spring (see samples #22 or 23).

- 5) Begin making arrangements for luncheon and opening ceremony speakers. Some suggestions include local people of interest, local dignitaries, state representatives or senators, local commissioners, educational speakers, motivational speakers, inspirational speakers, etc. Send a confirmation letter to the speakers requesting their biography, photo, if applicable, and meal

selections, etc. (see sample #10). Be sure to mention to the speakers that the Association pays for the meal closest to their presentation.

Past conferences have included an opening ceremony on Tuesday morning consisting of a color guard, pledge of allegiance, invocation, local official welcome, and speaker. The current President generally uses this event to thank the local County Treasurer for hosting the conference.

Include a sponsor recognition lunch during the conference to give them a chance to mingle with conference attendees and to thank them for their support. Any raffle winners may be announced at this lunch.

SIX MONTHS BEFORE YOUR CONFERENCE:

After you have valid estimates, commitments, or actual agreements for your hotel, reception, speaker, entertainment, and transportations costs, begin designing a registration fee structure to balance out the revenue side of your budget.

After you have a good estimate how much sponsorship contributions you expect, estimate what the registration fee structure for Treasurers and staff should be.

These fees should just cover the remainder of the total expected conference cost not covered by estimated sponsorship. Total cost should include scholarships. By this time, you will already have a very good idea of what the hotel (including hotel provided meals), transportation, entertainment, reception, and other costs will be, based on the arrangements you made or estimated costs and the counts you can expect from the historical data.

It is recommended that you develop a "registration fee" structure consisting of:

- 1) Membership/staff "full" registration. Most hosts have allowed for "partial" day registration. These are usually set at the price of any meal occurring during the period covered with the partial option. We have almost always allowed participants to bring a "spouse/guest" to meals or events. They would need to pay for the cost of that meal or a proportionate share of an event (reception).
 - a) Have the President arrange for the Conference Committee to present their recommended fee structure to the Board of Directors so that they may set the fee. The Board may elect to lower the fee, creating a deficit, and use Association fund balance to cover costs. The meeting and approval for the fee is often by conference call. A sample registration form is shown in (samples #3 & 4). **NOTE: Be sure to include, on the registration form, the deadline date for cancellation of registration, as well as the address and phone number of the attendee.**
- 2) Start drafting the Conference program. Include the education sessions with the subject, time/location, and speaker. Indicate which meals will be provided and where they will be served. Identify the luncheon and breakfast speakers. Use this process to double check that time slots are adequate, neither too long nor too short, for the subject. Allow time for focus groups to meet 1-2 hours. Allot unscheduled time, perhaps an open evening, for vendors to host customer appreciation events.

- 3) We recommend that you make registration available on the WSACT website about 4 or 5 months before the conference. See registration packet bullet below for items to be included.

WACO maintains the WSACT website. Contact WACO with the request to update conference information on the WSACT website. Be sure to update the email for the current association Treasurer so that he/she is notified when payments are made online. Be sure to update the email for the current association Vice President so that he/she is notified when scholarship forms are completed.

Registration Packet material to be sent out includes: 1) Cover letter, 2)

Registration form, 3) Hotel registration link, 4) Draft Program Agenda, 5) Banquet meal choice (include on the registration form, if possible), 6) Vendor registration form (include only in the Sponsor/Vendor material), 7) Transportation organization options, 8) List of local activities for family member (optional) 9) Information about the selected hotel and other hotel alternatives and 10) Pre-Conference events with any registration forms and unique instructions for registering.

A FEW MONTHS BEFORE YOUR CONFERENCE:

- 1) Finalize all event arrangements, transportation, menus, etc.
- 2) Contact your local Convention and Visitors Bureau, Chamber of Commerce or Economic Development Council for promotional handout material to be included in the packets given out at the registration desk. Examples are complimentary key rings, gifts, pens, informational pamphlets and coupons for shopping, restaurants, or area tourist attractions, etc. We recommend that you have the packets prepared at least one week prior to the conference.
- 1) You may or may not want to include meal tickets to ensure that everyone has properly registered to receive each specific meal. It depends on your meal prices and the arrangement you have made with your hotel. Some hotels will only charge you for the number that show up. Some will require a count and will charge you for that count. The tickets help you track partial registrations and guests for the banquet and reception.
- 2) You may want to contact local retailers to donate door prizes for the conference. Tickets should be included in the registration packets.
- 3) You will want to determine early when the prizes will be distributed. The stub from the meal tickets could be used when drawing prizes. If you choose this option, remind the attendees to bring their tickets with them to the meals/events.
- 4) Arrange transportation to take attendees to events away from the hotel site. Most towns that have hotels large enough to accommodate the conference have van or bus service. Your Convention and Visitors Bureau is a good source for service providers. Treasurers are relatively flexible, however, the vans or buses should be fairly comfortable.
- 5) Begin some of the clerical requirements such as preparing registration packets and name badges for the Treasurers, Vendors, and Sponsors. You could begin

drafting reminder letters for speakers, etc. Recently logos for WSACT and for individual sponsors and vendors have been added to name badges. Obtain the template from the previous conference host.

Apply for a liquor license for each event that you will be providing alcohol if the facility or caterer does not supply the license with their service. You need to ensure that the Liquor Control Board in Olympia receives the application no less than 30 days before the event(s). (See sample #24.) **Reminder: The Association cannot pay for alcohol and most of the time you will be using a no-host bar.**

ONE TO TWO MONTHS BEFORE THE CONFERENCE:

- 1) After the education schedule and all of the speakers have been confirmed, you will need to have a final program printed to be included in the registration packet distributed at the conference. The program will include the schedule for all of the sessions, identifying the topic, speaker, meeting/event locations, and time for each conference event. The Washington Association of County Officials (WACO), our parent organization, has assisted in the printing of most of the past programs for the WSACT conferences. A few hosts have created their own to save costs. You could also have them printed locally. The advantage to having WACO assist is that they keep current data and pictures of County Treasurers. To assist you with determining appropriate pamphlets, registration forms, etc. review the historical data from previous conferences and/or ask previous conference hosts. NOTE: Give yourself plenty of time in case there are unforeseen circumstances that could delay printing of the program. Printing should be finished no later than the third week in May. If WACO prints the programs, they need the information by the first week in May.
- 2) Identify and schedule volunteers to assist at the registration/information tables, to serve at breaks in the hospitality room, and to help with the education programs. A possibility is allowing smaller adjoining counties to co-host and assist in supplying the volunteers. You could decide whether to offer free registration to any county that volunteered to help. The individuals at the registration table will give information, updates, and receive payments for the event. They will also act as the liaison between the hotel and the conference to assist attendees with lost and found items, problems associated with the conference, and displaying of messages on the message board.
- 3) Begin putting the registration packets together. This normally includes the program, a map of the hotel facility, tourist information and map for the area, pen(s), note pad(s), etc. Make sure the non-registered vendors and sponsors receive a copy of the program.
- 4) Take care of any last minute changes, cancellations by speakers, etc. The Conference committee can assist in finding replacements. Generally you will have far more suggested speakers than time. Keep a list of possible speakers and refer back to it for possible fill-ins.
- 5) Make sure you have biographies from all of the speakers and instructors to be used for introductions. The Education Chair will introduce the instructor. The

President or the Host will introduce opening ceremony speakers. Begin compiling your announcement sheet and an agenda for each event so that the facilitator has something to follow. Determine ahead of time who the facilitator will be for each part and include it in the agenda.

- 6) Have a backup plan for almost every aspect of the conference (i.e. speakers, equipment, printing, facilitators, locations of events, transportation, caterers, etc.). Know who is doing what and when.
- 7) Make sure you will have the necessary audio/video equipment and support required by your speakers. You need to coordinate this with the Education Chair.
- 8) Provide an attendee list to attendees including sponsors and exhibitors one or two weeks before the conference. Names only is sufficient and preferred.

DURING THE CONFERENCE:

- 1) We recommend that you keep the registration desk attended at all times during working hours. The hotel or attendees will need a place to go for answers to questions that arise. They usually need to be answered immediately. You will probably need to have a petty cash fund at the registration desk for last minute meal registrations. Occasionally, they are made with cash. Also, small expenditures may occur during the conference that staff will need to handle when you are busy. Have a current list of attendees for your registration table volunteers. Include a place for them to record last minute registrations and account for any monies received.
- 2) Be sure to make announcements several times during the conference. Not everyone attends every session. Do not assume that participants will read message boards. There are often changes in the program, room location, times, etc. that needs to be announced. We recommend that you list them as soon as you become aware of the change. Include the location of the restrooms and emergency exits in your announcement.
- 3) We recommend that you prepare an agenda for the President, Education Chair, and yourself to follow during events such as the opening ceremonies. This ensures that thank you(s) are given, dignitaries are recognized, and specifics are addressed.
- 4) We recommend that you consider having a copy machine available for participants to use during the conference. Some hotels will let you use theirs at a considerable fee. Office supply companies will usually rent you a machine for a week. We also recommend that you have a cell phone available for contacting hotel staff, transportation volunteers, and other miscellaneous reasons that will arise. Have miscellaneous office supplies available at the registration desk as well as a calculator and possibly a laptop.
- 5) You may have some expenses that will need to be paid at the time of the event, i.e. caterer or entertainment. Be sure the Association Treasurer is prepared to handle this and should be coordinated according to the circumstances. You will need to be very flexible.

- 6) Make sure the President is aware of their responsibilities during the conference. (Specific responsibilities are listed later in this manual.)
- 7) Act as a Liaison in facilitating the Education Chair and your audio/visual supplier.
- 8) Handouts to be distributed during the conference: 1) Evaluation form(s), 2) Verification of Continuing Professional Education Credit Form (approximately 20 - 30 per session), 3) Continuing Professional Education Attendance Signup Sheet (approximately 2 per session). **Note: Be sure the Education Chair fills in the date, instructor, class, and time on the Education Credit Signup Sheet prior to the conference session.** (See samples #12- 15.) The Host will retain a photo copy of the program, etc. The Education Chair will keep the Educational information. The members are responsible to retain their own original records for recertification to the State.

WRAPPING-UP:

- 1) Send thank you notes to the Sponsors, Speakers, Entertainers, Volunteers, etc. who contributed to the success of your conference. (See samples # 16- 20.)
- 2) Send invoices to anyone with outstanding charges. (See sample #21.)
- 3) Make sure the Treasurer knows about any last minute charges or expenses, including travel and promised stipends.
- 4) It is important that accurate financial breakdown of costs, attendance, etc. be kept during the event. At the conclusion of the conference, the Host, Treasurer, and President will meet with the hotel to ensure accuracy of the billing including headcounts, meal counts, and contracted costs. Then, the Treasurer will write the check according to the final agreement.
- 5) Be sure to forward your data to the next year's Host. Have it organized in a manner that allows that person to easily understand your information. Try to follow the format set by previous hosts. The Association Treasurer will review the conference books with the President, current Host, and conference committee, who are aware of what is expected. Then, the books are released to the audit committee. This is done in September at the Legislative Conference or at WACO in October.

CHECKLIST AND RECOMMENDED TIMELINES FOR ORGANIZING YOUR CONFERENCE:

- ☐ Identify a location for the conference prior to bidding on the event.
- ☐ Secure the hotel location for the event as soon as possible upon receiving the bid. However, it should be no later than June of the previous year.
- ☐ Secure a location for the President's Reception before setting fees and prior to mailing the registration packets.
- ☐ Determine the menu before setting fees.
- ☐ Determine the education agenda by January. --

- ☐ Identify speakers before setting fees. Travel costs and meals may be included in the speakers' cost.
- ☐ Send letter to potential sponsors in December and a reminder in
- ☐ February. (Major sponsors should be called personally to request their support. After they commit to sponsorship, mail a reminder letter to them by
- ☐ February.)
- ☐ Identify entertainment (musician(s)/comedian, etc.) for the banquet.
- ☐ (You may want to include their name in the draft program.)
- ☐ Set registration fees and send the form by January 15th.
- ☐ Print the final conference program by May 1st.
- ☐ Invite WACO staff and past County Treasurers to the conference.
- ☐ Invite the State Treasurer to the conference.
- ☐ Two weeks before conference provide an attendee list (without contact information) to registered attendees.

SUMMARY OF RESPONSIBILITIES BY INDIVIDUAL:

President Responsibilities:

Current President:

- Assist with organizing the President's Reception. The Bar must be sponsored or no-host because alcohol cannot be purchased from Association or conference monies.
- At the opening ceremony, thank the Host of the Conference.
- At the banquet, thank your Board of Directors. Some Presidents have given small thank you gifts to their Board. Association funds cannot be used for personal gifts.
- Generate and e-mail the agenda for the general business meeting at least three (3) days before the meeting.
- Conduct the general business meeting.
- Remind Committee Chairs to notify the Host if they need a meeting room during the conference. This should be done at least a couple of weeks before the conference so that the host can put the meetings on the schedule.
- Provide for food and beverages for the hospitality suite. The President will either do this personally or arrange for volunteers to do this since the Association will not purchase alcohol for the hospitality suite, it is the hosting President's decision to personally pay for and provide alcohol in the hospitality suite. Association members may personally contribute to offset the costs by donation.
- If the hospitality suite is sponsored by a vendor(s), all expenses (including the room fee) are the sole responsibility of the sponsor and not the Association.

Incoming President:

- Present the current President with a plaque or honorarium at the banquet.
- At the banquet, introduce your newly elected Board of Directors. This is a good time to mention your vision for the upcoming year.
- Typically, the business meeting has been conducted on Friday morning with the presentation of the resolutions and memorials.
- Generally, hold first E-Board meeting to set the new budget after the general meeting adjourns.

Education Chair:

- Determine the educational agenda.
- Provide the Host with meeting room requirements for each session.
- Work with the Host to set the schedule.
- Find qualified instructors and make all necessary travel, supplies, and equipment arrangements.
- Responsible to stay within Education budget.
- Notify the conference coordinator of the supplies, and equipment needs so that they can notify the hotel within 1 - 2 weeks prior to the conference to ensure availability.
- Manage CPE sign-up sheets and record retention.

Association Treasurer:

- Bring the Association checkbook and debit_card to the conference to pay the expenditures, last minute expenses, and hotel closeout
- Track donations and vendor sponsorships separately to ensure that any money spent on alcohol does not come out of the Association dues or registrations since Treasurers and county employees are typically reimbursed for WSACT dues and registration fees.
- Pay expenses incurred prior to, during, and after the conference. Be sure to keep copies of receipts received and payments made.
- Forward copies, to the conference Host, of all sponsor/vendor money received, registration forms and payments made so they can track head count, revenue, and expenses.

Host Responsibilities:

- Everything else.

Section III: History, Preferences and Conference Suggestions:

There is flexibility in planning the conference agenda, and preferences of attendees may change over time. With this in mind, this section captures some of the changes made over the years and the reasoning behind those shifts.

WSACT Annual Conference Historical Statistics

Year	Location	# Attendees	# Rooms	Conf Agenda Start	Conference-Agenda End	Meal Count
2022	Mason County, Alderbrook Resort	121 Registered (62) Treasurers (8) Presenters (51) Sponsors	86 rooms/ cabins	Tues 9:00 a.m.	Friday 10:00 a.m.	115 conference meals * all meals were at Alderbrook
2019	Okanogan Co, Sun Mountain Lodge	128 Registered 78 WSACT 22 Presenters 52 Vendors Sponsors 3 Guests	116 99 Rooms 9 cabins 8 offsite	Monday 9:00 a.m.	Friday 10:00 a.m.	120 conference meals *all meals at Sun Mtn.
2018	Whidbey Island	153 (73 WSACT, 20 Presenters, 60 sponsors & Exhibitors)	120 (80 WSACT, 40 vendors)	Tues, 8:00 AM	Fri, Noon, (ended 10:15 am)	90 Pre-conference, 130 conference meals
2017	Walla Walla	136	90+	Wed, 8:30 AM	Fri, 10:30 AM	125
2016	Olympia	120		Tues, 9:00 am	Fri, 10:00 am	
2015	Leavenworth	115	83	Mon, 12:00 pm	Thurs, 1:00 pm	6 meals