

# Washington State Genealogical Society

## Suggested Guidelines for a Conference or Seminar

The following guidelines were created for host societies who will sponsor the WSGS State Conference. In drawing up the guidelines it occurred to the Education Committee that they could be used for any genealogical seminar or conference. We would encourage people from local societies to freely use any ideas or materials in these guidelines to assist them in planning for a successful conference of any type.

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## Conference Guidelines: Committees & Subcommittees

### Conference Planning Committee

In order to prepare for a successful event, a conference planning committee should be functioning at least a year in advance of the date of the conference. The conference committee is made up of chairpersons from each of a number of subcommittees. The group should meet on a regular basis. To begin with, meetings can be held every two months. When the conference is six months away, meetings need to be held every month. The conference committee can meet as often as it wishes during the last month depending on how many "loose ends" need to be tied together.

### Subcommittees

The subcommittees of the conference planning committee should include:

- Facility/food committee

- Program/speaker committee
- Vendor/door prize committee
- Publicity committee
- Registration/Syllabus committee
- Clean up committee

Each subcommittee can consist of several chairpersons who handle various tasks under the auspices of the subcommittee. Remember that a wide distribution of responsibilities will ensure that a few people aren't overburdened with too many tasks.

In the beginning stages the conference committee should select a conference chairperson to whom all subcommittee chairpersons report. The conference chair can assume the role of master of ceremonies or appoint someone to act as MC on the conference date. The program/speakers committee will need to know who will be acting as the master of ceremonies.

It is the responsibility of the planning committee to prepare a proposal to be presented to the WSGS Board. The proposal should include projected registration fees based on facility, food, and speaker costs.

As the conference committee proceeds through its bimonthly and monthly meetings, the conference chair needs to call on each subcommittee to give a report of its progress. In the early planning stages more meeting time will be spent on facilities, vendors, door prizes, and publicity. As the conference date approaches, much of the meeting time will switch to program, registration, syllabus, and food. It is important to touch base with all subcommittees at each meeting to insure that progress is being made. In an extreme case a conference chair should be ready to replace any subcommittee chair if sufficient progress is not being made.

## **General Conference Guidelines**

### Board Level

Invitations will be submitted by local societies to host upcoming conferences and the WSGS Board will make the final decision as to the general area/site (community of the state) where the conference will be held.

A hosting request letter should be sent to the WSGS Board at least one year prior to the state conference. The proposal in this letter will then be accepted or rejected by the WSGS Board and the hosting society notified. The WSGS Board has final approval of chairperson, site, theme, menus, flyers, and brochures for the state conference.

A letter of appreciation should be sent to the host society by WSGS following the conference.  
[sample hosting request letter]

## Host Group & Conference Chairperson

The host society shall select a chairperson with the approval of the WSGS Board. Said chairperson will be a WSGS member and will preferably have attended at least one previous WSGS conference. Only WSGS has the right to remove a conference chair from his/her duties. The conference chair is directly responsible to WSGS.

The host society and conference chairman may select the site and general theme of the conference, but the WSGS Board must give final approval.

All local societies should be "asked" to participate in the conference by doing a "job." Remember that this is a WSGS statewide function, not an individual society function. The distribution of duties for the conference should include and involve as many local societies as possible.

## **Conference Guidelines: Facility & Food**

- Finding a facility
- Food Service
- Volunteer staff requirements

Be realistic and give conservative estimates in the number of people attending. Choose moderately priced rooms and meals to fit the area/community. Consider local residents who drive and don't need overnight accommodations in determining the costs of amount of reserved rooms needed.

The menu and choice of meals shall have the final approval of the WSGS Board. Use discretion in the selection of the menu. (Stay away from seafood meals, consider the eating habits of the elderly, and consider the activity level and size of servings.) All meal tickets should be collected and compared to the facility's count for each meal. It is suggested that doors to eating areas be kept locked and tickets collected at the door as attendees enter or that the tickets for each meal (such as a box lunch) be collected at the table prior to handing out that meal.

### **Facility/food committee**

A clean, safe, well-organized facility goes a long way toward making a successful conference.

### **Finding a facility**

The facility space required depends on the number of classes running simultaneously at any one time during the conference. On the other hand, the number of speakers who can be scheduled will depend on how many rooms are available for use at any one time in the facility. Therefore, it

is best to survey the community for all available facilities and coordinate the information with the program/speaker committee and the vendor committee.

The Chamber of Commerce or Visitors' Information Center should have a list of locally available conference facilities. These may include conference centers, hotels, and restaurants with meeting rooms. These types of facilities usually have a "catering" service that will provide the space, arrange the seating and audiovisual requirements, and provide food service. This may be costly, but it simplifies the process.

Often missing from the Chamber of Commerce lists, but important resources nonetheless, are churches, fraternal order meeting halls, public libraries, park facilities, and schools. Public libraries and parks may have restrictions on allowing vendors. Schools may provide the most flexible facilities for a conference, other than commercial conference facilities.

### **Requirements:**

1. **Wheelchair access:** The first requirement for a facility is that it meets the standards laid out in the Americans with Disabilities Act. Wheelchair access to and within meeting rooms, restrooms, and vendor areas is a necessity.
2. **Seating:** Oblong tables as narrow as 18 inches with movable chairs (without arms) would be best for seating at the conference. Most genealogists are beyond the ability to fit comfortably into student desks. Large round tables may seat up to eight (8) persons but at least two will end up facing away from the table in order to see the speaker. Plan for aisle space down the center of the room or along both sides with adequate room to move between tables.
3. **Kitchen:** A kitchen or other room with a large sink will be needed for making coffee/tea. If refrigeration is not available, ice chests will be needed to cool milk, juice, and sodas (see Food Service).

### **Electronic & audiovisual needs:**

1. **LCD projectors:** Many speakers use their laptops for presentations, and this then necessitates using an LCD projector. Some may be able to provide their own, but oftentimes this is not the case. A projector should be provided for each speaker needing one, along with an individual who can be available to help set it up and get it working with the speaker's laptop.
2. **Wireless Internet:** If deemed necessary due to content of classes or the needs of the speaker, a wireless Internet connection may be required. Some larger facilities, such as hotels and libraries, may have this already available. If it is not, then a wireless modem needs to be brought into the facility and set up for use by the speaker(s).
3. **Audio:** For large lecture rooms an audio system will be needed for the speaker to be heard at the rear of the room. A wireless microphone is preferred, but a mike with a lengthy cord would allow the speaker to move about during their presentation. Make sure the system works.
4. **Lighting:** Adjustable lighting is preferred in the classrooms to make it easier to read the projected transparencies/laptop presentations. Windows should have blinds or curtains that can be closed. If these are not present, obtain butcher paper to cover the windows.

### **Rooms:**

1. **Main lecture room:** You will need a main lecture room capable of seating up to 200 people. Fixed seat theaters may have enough seating, but may not be the best for taking notes or comfortable for

larger participants. School cafeteriums (cafeteria with stage) with movable tables and chairs would be better. A gymnasium might have the space but acoustics can be terrible.

2. Smaller classrooms: The number of smaller rooms needed depends on how many speakers are scheduled for "breakout sessions." At conferences supporting the Washington State Genealogical Society, one room for up to 30 people will be needed for the Education Committee to present workshops on society management.
3. Vendor space: Additional rooms or hallway space will be needed for vendors. The vendor committee should provide you with the requirements for tables, chairs, and electrical outlets. Use graph paper to determine how to safely fit vendors into the space with adequate aisles for browsing. The vendors will want to set up the night before, so make sure the room or area can be secured overnight. If space becomes a problem you may wish to have society sales and information tables in a separate room.

### **Maps and Signs:**

1. Maps: After selecting a facility, draw up maps showing the location of all classrooms, restrooms, and vendor/exhibitor areas, as well as emergency exits. Maps can be used in the planning stage and then prepared for inclusion in the syllabus or registration packet. They can also be used by the registration committee to direct incoming traffic and posted in each room for quick reference.
2. Exterior signs: If needed and appropriate for the facility, place large 30" x 40" signs next to the street to identify conference parking, vendor loading zones, and vendor parking. Smaller 8" x 10" signs can be used to direct participants from the parking area to the facility entrance.
3. Interior signs: A "welcome" banner should appear above the registration tables. A "vendors" banner should be above the door leading to the vendor area. Signs may also be needed showing direction to vendors, restrooms, the freebie table, etc.

### **Decorations:**

Tables in the main assembly area can be festooned with flowers, plants, flags, crepe paper, or any other decorative arrangement. Decorations should tie in with the conference theme. At the conclusion of the conference the arrangements can either be given to committee workers or turned over to the door prize committee to be given away. Anticipated expenses for decorations should be included in the conference budget and reimbursed via vouchers.

### **Food service:**

Large hotels/conference centers normally require that their associated caterers provide all food and beverages for a conference at their facility. When the conference is held elsewhere the society can arrange with local caterers to have deli-style sandwiches made and delivered for conference participants. Commercial caterers are preferred over society volunteers to minimize liability.

### **Caterer-supplied food:**

The caterer can provide the deli sandwiches and vegetable sticks (or coleslaw/potato salad) for the box lunch. The sandwich would be made to order, wrapped, and the order attached for identification. The vegetable sticks in a baggy (or salad in ½-cup serving container) can be provided en masse in a box or bag for later distribution.

### **Sodas:**

Contact a local beverage distributor for drink donations. Companies must plan their charitable

donation budget well ahead of time so check 12 months ahead of your planned conference to find out when it is best to submit your request.

**Additional food and supplies:**

The society probably can purchase all the other lunch components along with paper bags, cutlery, straws, napkins, towelettes, etc. at a wholesale outlet. Also purchase bottled water for speakers. The bottled water can be distributed to the speakers by the room host.

**Lunch line:**

Four or five volunteers will be needed to staff the lunch lines. This system allows the lunch to be served quickly and smoothly.

Position 1. Have sandwiches arranged in alphabetical order (A-F, G-J, K-N, etc.). Each participant picks up his or her sandwich and a paper bag (as carrier and trash container). He or she then uses the order form to pick out the other items chosen.

Position 2. The participant is given the fruit listed as well as the cookie, mint, and vegetable sticks (or salad). Food items chosen must appear on the order form.

Position 3. Each participant may choose a bag of chips and is provided with cutlery, napkin, towelette, and straw.

Position 4. The participant is provided the chosen beverage or proceeds to self-serve coffee and tea. Since cold beverages may be in an ice bath, wipe away the excess water on the can.

**Trash:**

Arrange with the facility custodians to have lined trashcans ready in the lunch area.

**Volunteer staff requirements:**

**Liaison manager:**

This person is the host society's point-of-contact with the facility management and the custodians. Remember that school custodians are aware of summer maintenance projects when front office people are not, and are often the most important contact when choosing conference dates. All conference volunteers should know who the liaison manager is, so he or she can be contacted in case of spills, equipment failure, changes in room heating and cooling needs, accidents, overflowing trash, expended washroom supplies, etc. The liaison manager is then the only person who will contact the custodians or facility staff. Pagers or cell phones are desirable for making contact.

**Room hosts:**

There is one room host for each room being used. The room host is responsible for posting

classroom signs. She could check out the A/V equipment to make sure all is working and know where replacement bulbs and batteries are stored. Obtain bottled water for each speaker. Label each bottle with the speaker's name. Read the speaker's bio and try to have a chat in advance of the session. Introduce the speaker to the attendees and then close the doors. Be prepared to adjust heat, lighting, ventilation, blinds, etc. Also be prepared to report any problems to the liaison manager. Try to arrange for later arrivals to enter at the rear of the classroom. Between sessions pick up loose trash, but do not disturb things left at a seat if it appears that the participant will be returning for the next class. After the last session, unplug A/V equipment and wrap cords. Clean off tables and make sure the room is in good order. When all is accomplished, check out with the liaison manager.

**Gopher:**

One person with a vehicle may be needed to run to town to procure any missing or forgotten items. The gopher can also "go for" any supplies that appear to be running low.

**First aid assistant:**

Procedures and responsibilities for health emergencies should be agreed to between the host society and the facility management before the conference. The society should ensure that someone with first aid/CPR training is available as a first response to emergencies. This person can be either a facility employee or a volunteer with a medical background. A cell phone is recommended for contacting 911. The liaison manager and registration table volunteers must know who the first aid contact is and where h/she is at all times.

**Food servers:**

See job descriptions listed above.

**Movers and shakers:**

A couple of people may be needed to assist speakers and vendors to bring in and take out materials. These volunteers can be strong teenagers. It is wise to provide these volunteers with hand trucks. The movers and shakers should be introduced to the liaison manager and the vendor room host so they will know who to contact if speakers or vendors ask for extension cords, extra chairs, etc. The movers need only attend during setup and take down.

**Cleanup crew:**

Responsibilities for cleanup should be agreed to by the facility and the host society prior to the conference. Work with the custodians. Assist in disposal of trash if required and watch out for items left by participants. If you are using a facility that does not have custodial staff, consider hiring a local Boy Scout troop or a church youth group. A donation to their group is an relatively inexpensive way to gain willing helpers with this important task.

**Troubleshooter:**

A troubleshooter should be available during the conference to help with....

# Conference Guidelines: Speakers & Program/Agenda

WSGS has both national and local genealogical speaker's lists on its website at: <http://www.rootsweb.ancestry.com/~wasgs/wsgssocres.htm>. These can be used to help host societies in choosing either one main speaker for an all day seminar, a number of local speakers for a series of courses throughout the day, or a combination of the two.

Speaker contracts are imperative. This contract should cover in detail all possible items of speaking times (time table or agenda), travel arrangements, lodging and meals, submitting information for the conference syllabus, and any other incidentals. Speaker contracts need to include a statement dealing with the speaker's contracting to speak with/or for other groups while in the state. If such arrangements are to be made, then other groups help pay a percentage of the speaker's airfare/travel.

## Sample speaker contract

### LETTER OF AGREEMENT

On this, 08 October 2007, the host society for WASHINGTON STATE GENEALOGICAL SOCIETY, SKAGIT VALLEY GENEALOGICAL SOCIETY (hereinafter called the Society) and SANDRA HARGREAVES LUEBKING of Cook County, Illinois, (hereinafter called the Speaker) do agree that they will jointly produce an educational seminar on 16 & 17 May, 2008. The following terms shall apply:

**1. Content of Program.** The Speaker will provide four (4) 75-minute lectures on topics selected by the Society, from a list provided by the Speaker, with the understanding that the speaker will have final approval of the combination and sequence of topics selected. Agreement over the topics should be reached as promptly as possible after the execution of this contract. In no case shall this decision be made less than three (3) months prior to the seminar date.

**2. Lecture Enhancements.** The Speaker agrees to provide lecture enhancements (outlines, bibliographies, maps, glossaries, or other appropriate matter) of no more than four (4) pages per 75-minute lecture. The Speaker will provide camera-ready masters for each set of lecture materials and shall submit these one month prior to the date of the seminar. The Society shall then duplicate copies commensurate with the number of registrants. The Society may choose to assemble these into booklets (or syllabus) form, provided that any such booklets:

? May not contain advertisements of other individuals or firms without the speaker's approval (thereby preventing any inappropriate appearance of endorsement on the part of the Speaker).

? May not be sold or otherwise distributed to non-attendees.

? Maintain the page numbers as shown by the Speaker (Society is not to renumber pages).

**3. Equipment.** The Society agrees to supply the equipment requested in a separate, to be set up *in working order* (with spare bulbs and batteries) at the hour that doors open for the registration of attendees. The equipment requirements will be confirmed after lecture selection and shall not exceed the following:

? Overhead projector (not opaque) or LCD projector with Laptop

? Large screen (8' in small rooms; 10' to 12' for large rooms, meeting halls and auditoriums)

? Microphone (portable, lapel style)

? Small table to hold Speaker's notes)

**4. Facilities.** The Society shall be responsible for selecting and preparing the meeting site. The seating capacity of the facility should consider the number of registrants which the society customarily draws. Seating arrangements should insure that no attendees have their backs to the speaker or to the screen upon which visual aids are projected.

Lighting should permit comfortable viewing of visual aids without excessive darkness or screen washout caused by sun glare. Acoustics should be tested in advance.

**5. Taping.** The Speaker allows individual taping only for those whose physical impairment prevents them from taking adequate notes. The resulting tapes are for their private use, with the understanding that these are not to be duplicated, transcribed, or otherwise disseminated. Commercial taping or taping by the Society for distribution to non attendees, Society members or library patrons, is not authorized.

**6. Publicity.** The Speaker agrees to provide the Society (upon request) with a black and white glossy photograph, a professional and personal biography, and other publicity materials, as requested. The Society shall provide to the Speaker an advance (approval) copy of any publicity prepared for distribution-including copy for the flyers that announce themes, topics and services. The Society further agrees that publicity efforts will begin at least three (3) months prior to the seminar and shall extend to other societies and potential attendees within at least a two-hour driving range.

**7. Lecture Fees.** The Society agrees to pay the Speaker a basic fee of \$1900 for four (4) sessions. For this event, a "session" is any single presentation of 75-minutes or less in length. Sessions beyond four (4), including question/answer periods of more than 10 minutes in duration (other than those determined by the Speaker), will be charged at \$425 each. Payment is due on or before the day of the seminar.

**8. Travel Expenses.** The Society will reimburse the Speaker for airfare plus \$50 Chicago-area transport. The Speaker will make the flight reservations and submit an invoice to the Society. The Society will provide reimbursement within two weeks of receipt of the invoice. The Society will reimburse the Speaker for costs (if any) between the airport and conference hotel on the day of the seminar.

**9. Personal Accommodations and Meals.** The Society will arrange for two nights lodging at a suitable hotel (a nonsmoking, quiet and safe room). The Society will provide transportation (if appropriate) to and from the hotel and the conference site. The Society is responsible for event-related meals only.

**10. Cancellation Clause.** This agreement may be canceled if (1) a natural or public disaster should render the program unfeasible; (2) the Society deems there will be insufficient attendance (at least five business days prior to the event); or (3) serious illness or family death should incapacitate the Speaker. If a natural or public disaster requires cancellation, the Society shall not be responsible for the Speaker's fee but shall reimburse the Speaker for a \$500 preparation fee. Should the Society elect to cancel the event or wish to void this contract for any reason (other than natural or public disaster), for example, insufficient attendance, (the latter determined five days in advance of seminar), the Society shall reimburse the Speaker ? of her lecture fee as stated in clause 7 of this contract unless written notification is received and acknowledged by the Speaker at least thirty (30) days prior to the event. If the thirty-day condition is met, no penalty fee shall apply except the Society shall reimburse the Speaker any advance sums she may have expended for transportation. In the event that the Speaker should be unable to fulfill her obligations, she agrees to assist the Society in finding a comparable replacement and will not expect reimbursement from the Society for any advance sums she may have expended.

AGREED TO BY AND BETWEEN:

\_\_\_\_\_  
(name of Sponsor signing for the Society) Sandra Hargreaves Luebking, Speaker  
P.O. Box 271, Western Springs, Illinois 60558-0271

\_\_\_\_\_  
E-mail fgseditor@sbcglobal.net

\_\_\_\_\_  
(title of Sponsor signing for the Society) Voice/fax (708) 458-1466

Date: \_\_\_\_\_ Date: \_\_\_\_\_

**SPONSOR SHOULD SIGN BOTH COPIES, RETAIN & RETURN ONE**

A price "lid" will be set and reviewed annually by the WSGS Board concerning allotments to speakers for speaking fees, travel, meals, and lodging accommodations for three (3) nights.

WSGS will pay a speaker's fee or honorarium, with no substitutes. If a speaker desires other arrangements, he can do so on his own (i.e., sightseeing and other local travel).

The conference program or agenda will be set up in advance. Evenly distribute speaking time among speakers and obtain their approval. Avoid last minute changes and substitutions.

Past conference evaluations show that attendees like having "mini-sessions," and one-hour sessions are generally most preferred. It is recommended that the host society use the expertise from the various local areas/regions as mini-session speakers. Do NOT make the "little man" compete with the "big man" during mini-sessions. Mini-session speakers may receive conference registration, exclusive of meals, as payment to speak.

An annual WSGS membership meeting must be allotted in the agenda. This is an important meeting and enough time needs to be allowed to cover the necessary society business. Allot a minimum of one (1) hour for the general meeting and 15-20 minutes for regional meetings.

A Sunday morning breakfast board meeting is a nice way to end the conference. Societies can use this transition time for the installation of new officers and the recognition of outgoing officers, as well as for a brief conference evaluation while everything is still fresh in everyone's minds.

The chairperson and host society will have final approval on the agenda or schedule to be passed out at the door to conference attendees.

[Attached pdf: Sample conference agenda](#)

### **Speakers/program**

Speakers should be chosen after several other circumstances are determined, such as the topic(s) of the event and whether local or national speakers are desired. The WSGS National and Local Speaker pages at the WSGS web site are a good place to start when looking for speakers.

A "theme" should be chosen for the conference. When approaching a possible speaker it is possible to inform them of the theme and ask if they have presentation ideas within that theme; they can be given a specific topic; or they can be given a choice of several topics, all of which fall within the scope of the theme.

The theme, in most cases, creates its own list of possible presenters, and is often chosen by the board or the host society. The first order of business then becomes obtaining a signed contract for their services, which should include any costs to the host (transportation, meals, housing), the number of hours the speaker will be presenting, the topics of the event, the date of the event, and a due date for a biography and for the syllabus pages. This step should be tied into the facility preparation, so that times of arrival and departure, and presentation lengths are known.

When scheduling speakers allow ample time between sessions for a physical break, to travel to another location if there are several speakers, and time for a quick stop by the vendor tables.

The event day schedule should begin with a large block of time for on-site registration. The final speaker should be finished no later than 4 p.m. (unless scheduled as a pre-night of seminar

lecture), as attendees are anxious to leave at the close of the seminar. No presentation should last longer than 1-1/2 hours.

Time should be allotted for a WSGS annual meeting, preferably during or just after lunch on a Saturday.

A date, at least one month prior to the event, should be set for receipt of a speaker's bio and handouts. A suggested limit for the number of handout pages per presentation should be made, with six being a good figure in most cases. These should be placed in a syllabus.

An evaluation form should be included in the packet with the syllabus for attendees to be able to provide feedback for those presenting at the conference.

## Sample Evaluation Form

Washington State Genealogical Society  
2008 Conference & Annual Meeting  
Hosted by Skagit Valley Genealogical Society  
Mount Vernon, Washington

### How Did We Do?

1. Were the class sessions enjoyable/informative, and was enough time allowed for each topic?

Friday Evening Bonus Presentation:

Poor      Great      Too Little      Too Much  
Content: 1 2 3 4 5      Time: 1 2 3 4 5

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

1st Session: Topic: \_\_\_\_\_

Speaker: \_\_\_\_\_

Poor      Great      Too Little      Too Much  
Content: 1 2 3 4 5      Time: 1 2 3 4 5

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

2nd Session: Topic: \_\_\_\_\_

Speaker: \_\_\_\_\_

Poor      Great      Too Little      Too Much  
Content: 1 2 3 4 5      Time: 1 2 3 4 5

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

Software Session: Topic: \_\_\_\_\_

Speaker: \_\_\_\_\_

Poor      Great      Too Little      Too Much  
Content: 1 2 3 4 5      Time: 1 2 3 4 5

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

3rd Session: Topic: \_\_\_\_\_

Speaker: \_\_\_\_\_

Poor      Great      Too Little      Too Much  
Content: 1 2 3 4 5      Time: 1 2 3 4 5

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

4th Session: Topic: \_\_\_\_\_

Speaker: \_\_\_\_\_

Poor      Great      Too Little      Too Much  
Content: 1 2 3 4 5      Time: 1 2 3 4 5

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

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2. Were break time sufficient?

Too Short    Too Long    Too Short    Too Long  
Morning 1 2 3 4 5    Afternoon 1 2 3 4 5

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

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3. Lunch

Poor                    Great    Too Short            Too Long    I Ate Out  
Quality: 1 2 3 4 5    Time: 1 2 3 4 5                    n/a

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

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4. Additional comments about program or facilities, suggestions for improvement: (Turn over and use the backside of this form.)

## **Conference Guidelines: Finances**

The treasurer shall pay all bills that are properly documented (i.e., receipt and itemized with statements with reason incurred). All bills go through the treasurer to be paid.

WSGS funds shall not be used as monetary rewards or compensation for personal service (i.e., member's meals, lodging, transportation, etc.) unless specifically authorized by the WSGS Board.

A running account of all expenditures by all committees shall be kept and reported at all WSGS Board meetings. A final conference financial report shall be reported at the next board meeting following the conference.

All promotions (i.e., discount tickets, bus trips, etc.) shall be approved by the WSGS Board.

Refunds: transfers to another individual can be made only at the discretion of the original purchaser up to the start of the conference, and by approval on a case-by-case basis.

### **Financial Management Procedures**

1. After the WSGS Board approves the selection of an organization to host the WSGS Conference and Annual Meeting, the host organization will appoint an individual as the Host Conference Treasurer to function as liaison with the WSGS Treasurer.
2. The Conference Host Society should develop a preliminary conference plan and submit a financial estimate to the WSGS Board as early as possible after being selected as Host. The majority of WSGS funds are maintained in certificates of deposits. If significant expenses, such as speaker airfare and conference facility rental fees, will need to be paid before the conference, action may need to be taken several months before the conference to ensure CD funds will be available.
3. The WSGS Treasurer will send the Host Conference Treasurer a rubber stamp for endorsing checks for deposit in the WSGS bank account, and will transmit WSGS forms for Conference Expense Voucher, Conference Registration Fees Transfer, Conference Vendor Fees Transfer, and Miscellaneous Funds Transfer activities.

- A. Incoming checks and cash should be consolidated and processed to the WSGS Treasurer at least once a week to prevent delays back to the originators' bank accounts.
    - 1. Each check should be stamped with the WSGS bank account endorsement and forward with the appropriate Transfer form to the WSGS Treasurer.
    - 2. It is suggested a photo copy of the Transfer form and all checks be made and retained by the Host Conference Treasurer or Registrar to help resolve any disputes which may arise at the conference. (At least five checks can be reduced onto a single copy sheet.)
  - B. The WSGS Treasurer will process the checks to the bank for deposit and sign and return the original Transfer form to the Host Conference Treasurer/Registrar.
4. The Host Conference Treasurer will:
- A. Submit a [Conference Expense Voucher](#), WSGS Form CEV, to the WSGS Treasurer for reimbursement or direct payment of expenses. The form may be initiated by a committee member but must be reviewed and forwarded by the Host Conference Treasurer. The Host Society President may review and forward expense vouchers in the absence of the Host Conference Treasurer.
    - 1. An expense voucher may be submitted to pay or reimburse only one payee.
      - a. Cash register receipts or paid bills must be attached to cover all requested reimbursements; however, multiple expenditures of the same category, such as postage for multiple mailing, may be combined into and described on a single line entry. Expense categories to be used are listed and explained on the voucher forms.
      - b. If an account is established with a commercial firm which will send a monthly billing directly to the WSGS Treasurer, attach a copy of completed job orders or receipts to the expense voucher and check-mark the comment "Service provider will submit account billing" next on the "TOTAL" line.
    - 2. The WSGS Treasurer will send payment or reimbursement directly to the payee at the address shown on the voucher.
  - B. Submit a [Conference Registration Fees Transfer](#), WSGS Form CRFT, to the WSGS Treasurer for registration and lunch fee received. The Host Society may elect to have the Transfer forms completed by the Registration Committee and submitted to the WSGS Treasurer directly or through the Host Conference Treasurer.
    - 1. It is recommended a registration number be assigned to each person when registrations are received. This number can be used on registration packet, name tag, door prize tickets and lunch order to maintain a positive connection throughout the conference processing.
    - 2. When registration for more than one person is paid with a single check, list both the payer (check signatory) and the additional attendees on separate lines of the Transfer form. Enter the fees individually for each person, and put ditto marks [""] or the phrase "See Above" in the "Check # or 'Cash'" column for the additional attendees. The total amount of the check may be entered in brackets in the "Notes" column.
    - 3. Speakers also may be assigned a special registration number for identification with lunch orders and door prize tickets. The number also should be entered on the Transfer form, under "Reg No." to connect the individual with the payment of registration fees.
  - C. Submit a [Conference Vendor Fees Transfer](#), WSGS Form CVFT, to the WSGS Treasurer for vendor table and lunch fees received. The Host Society may elect to have the Transfer forms completed by the Registrar or Vendor Committee and submitted to the WSGS Treasurer directly or through the Host Conference Treasurer.

1. Include the vendor's corporate name and address, plus the number of tables and number of lunches requested on the Transfer form.
  2. If payment is made with a personal check, include the personal name which appears on the check.
- D. Submit a [Miscellaneous Funds Transfer](#), WSGS Form CMFT, to the WSGS Treasurer for income received from Conference sponsors, donors or other non-registration sources. The Host Society may elect to have the Miscellaneous Funds Transfer forms submitted by the Host Society President in the absence of the Conference Host Treasurer.
1. For income from Sponsorships provide the corporate name and address and the name and telephone number for the corporation's representative so letters of appreciation and receipts for income tax purposes may be sent.
  2. For income from other donors provide the name and address of the donor so letters of appreciation and receipts for income tax purposes may be sent.
  3. For other miscellaneous income, identify the source.
5. The Conference Host Society may request a Petty Cash Fund, in the amount of \$200.00, to use for payment of minor expenses when submitting an Expense Voucher would be wasteful or untimely. For example, if an oversized envelope must be taken to the post office for weighing and metering, the postage could be paid out of petty cash, while the purchase of a book or roll of stamps in anticipation of multiple mailings should be reimbursed through an Expense Voucher.
- A. The Host Conference Treasurer or Society President may request a Petty Cash Fund by submitting a Conference Expense Voucher to the WSGS Treasurer. The Host Society will determine how they will manage these funds; however, it is recommended receipts be obtained whenever possible and kept to document expenditures.
  - B. The WSGS Treasurer will send the Petty Cash funds to the payee designated by the Conference Host Society.
  - C. The Conference Host Society will return any unused Petty Cash funds after the conference has ended using the Miscellaneous Fund Transfer form.
6. At the end of the conference:
- A. The check endorsement stamp and duplicate documentation held by the Host Conference Treasurer will be returned to the WSGS Treasurer.
  - B. When all expenses have been paid, any excess income will be shared between WSGS and the Conference Host Society, in an amount negotiated between the WSGS Treasurer and Host Society President.

## **Conference Guidelines: Vendors/Exhibitors & Door Prizes**

Vendors invited to exhibit at the state genealogical conference must be genealogically and/or historically oriented.

Door prizes are not a required item. Do not spend money in obtaining door prizes, and do not use conference time unnecessarily in distribution of door prizes.

## **Vendor/Exhibitor Committee**

Vendors appreciate a great deal of lead time to form their schedules. The earlier invitations are given, the greater the chance of signing quality vendors. The vendor committee should work closely with the facilities committee early on to gather needed information. Visit the chosen facility. See how large the vendor room will be and how many tables will fit. Know where electrical outlets are located and whether the facility will provide extension cords. Measure the tables and include this information in your invitations. Find out if the room can be locked overnight, and see how close the room will be to other conference activities. Determine where the loading zone is located and how parking is handled. To assist out-of-town vendors, obtain lodging information from the host hotel and directions from the nearest main highway.

It is also very important to work closely with the registration committee to determine a fee for vendors should they decide to attend lecture sessions. The registration committee will need to know which vendors will be attending, how many meals will be required, and which lectures will be attended so that credentials may be prepared.

Invitations to vendors can be sent out as soon as the facilities are booked and conference dates are chosen. They can be sent out up to a year-and-a-half in advance, but certainly by six months prior to the conference. Since many vendors will be providing door prizes, whether or not they choose to attend, a letter soliciting door prizes should be sent in the same envelope.

[sample vendor attendance request] [sample door prize request]

As table reservations begin to arrive, it is important to make a copy of the vendor's check and send it along to the treasurer. Send the vendor a letter of confirmation with a contract to sign. Include information on lodging and directions to the facility. Know how many tables the vendor room will hold and be prepared to try table configurations as numbers become known. Also be prepared to send regrets if all table space have been sold. You may consider a waiting list in case a vendor decides to pull out.

The minimum recommended fee for vendor tables in a basic facility is \$25/table, with a fee of \$XX for each additional table. However, vendors must be self-sustaining. If the facility, such as a hotel, charges for use of a room, tables, table skirts, etc., then divide the cost of these items by the number of commercial vendors in order to cover the cost. Member societies are only expected to pay \$25/table and they may elect to share a table with another society.

Establish a strict schedule for table setup, and when take down can begin. Be sure to coordinate with other committees to make sure that setup in other parts of the building does not conflict with vendor setup. Make sure times are listed in the contract so vendors won't pull out too early on the day of the conference.

On the day of the conference, have the tables already set up with each vendor's name assigned. Have a couple of youthful volunteers with hand trucks ready to assist in moving heavy boxes. Introduce yourself to each vendor and let them know you are there if they have questions or need

assistance. Reserve the loading zone for vendors only and make sure vehicles are moved when unloading is completed.

When the conference is complete, the vendor list should be given to the conference liaison and then forwarded to the WSGS Education Committee chair.

## **Door Prizes**

Door prize drawings are a fun part of any conference and can be accomplished with little cash outlay. A conference is a gathering place for potential customers of publishers and vendors. They will donate prizes with the understanding that their names will be announced and sales brochures made available. Many local genealogical societies will often provide a door prize to attract potential members.

A letter soliciting door prizes should go out early. It should contain the date and place of the event and the number of anticipated attendees. Since many of the vendors will offer door prizes, the letter can be placed in the same envelope as the vendor letter. It should also be sent to major publishers of genealogical media around the U.S. as well as genealogical societies in the area. The solicitation letter should state that a list of donors will appear in the syllabus, a table will be provided for sales brochures (the "freebie table"), and the donor's name will be announced at the gathering.

The door prize chairperson will begin collecting boxes of sales material and donations, which need to be organized, listed, and sent to those in charge of the syllabus. Each door prize should be accompanied by a sheet of paper listing the donor's name, address, and a sample thank you note for the recipient to send on. In addition, the society should also send on a note of thanks to each donor.

Occasionally a donation is made which has a greater value than the other door prize items. These can be set aside for a special raffle. Tickets can be sold and a special drawing held at the end of the seminar.

As the conference date approaches, the door prize chairperson will be working closely with the registration committee. The registrar will assign each attendee with a registration number. This number will serve as a door prize identification number and usually tickets with this number accompany the attendee's name badge. At the most recent seminar, all door prizes were displayed on a table with a container in which attendees dropped their door prize tickets if they wished to compete for that prize. Tickets were then drawn during the session after lunch and winners recorded. Winners were posted in a central location where attendees could check their prize status. This location should be specified in the syllabus and announced during lunch.

Make sure attendees are aware that door prizes will not be mailed out and that if they need to leave early they should designate someone to pick up any door prizes they may have won.

Encourage recipients to write a thank you note via letter or email like the one provided. Publishers appreciate a word of thanks, knowing that their sales promotion was given. A word of thanks also greases the skids for future conferences as well.

### **Freebie table**

A freebie table is a great way for societies to "get the word out" about their society and make their presence known. A sample request for items for this table is included below:

#### **SAMPLE**

We would like to help you advertise your society! Help us to fill the Freebie Table at the 2008 Washington State Conference and Annual Meeting. We are aware that not every genealogical society will be able to attend in person, so the next best thing is for your society to be represented on our Freebie Table. This is a great way to promote your society and its activities. Please send your flyers, brochures, applications, publication list with prices, whatever, anytime before May 1, 2008 to SVGS, P.O. Box 715, Conway, WA 98238-0715.

## **Conference Guidelines: Publicity**

The conference chair should have a non-biased evaluation or editing of all materials before final approval of the WSGS Board is given on all flyers and registration brochures.

The publicity chair sees that properly-timed press releases and advertising of the conference are distributed in advance. This can be aided by posting this information on the WSGS website, as well as the site of the hosting society.

Flyers announcing the upcoming event should be sent to institutions (societies, libraries, archives, museums, and LDS Family History Centers) and newspapers, radio, and local television outlets in Washington and surrounding areas. Packets containing several registration brochures should be sent to the above places, and registration brochures mailed to all WSGS members (past and present) and all those who have attended past conferences.

### **Publicity Committee**

The successful publicity chairperson should be creative, a listener with brainstorming talents, a communicator and a detailed list maker, a deadline setter and follower, a methodical reviewer of the schedule, and be willing and able to delegate.

When one thinks of publicity, the old questions come forth as to WHO, WHAT, WHERE, and WHEN!

Goals should be acknowledged to answer each one of these W's.

WHO: the organization sponsoring the event. Who are they? What do you want the public to know about who you are? Are you local? Are you service-related? Are you hobby-related or a specialized group? Are you available to the public? Who are you?

Sample: The Washington State Genealogical Society (WSGS) with mailing address in Olympia, WA is open to all individuals.

WHAT: What do you want people to know about what you do? Are you offering something to the public? A seminar? Do you do this yearly?

Sample: ...is sponsoring its (year) annual meeting and education seminar. (Explain the seminar by its theme if there is one, who the speakers are, and their subjects.)

WHERE: This is the location of your event. If driving directions are needed, include them. It is recommended that you write them and have someone else test them before you print them!

WHEN: This includes the date and time of the doors opening, program starts, and program ends. If you have vendors still open after program ends, it includes time for clearing the building.

Sample: June 30, 2007, opening at 8:00 a.m. with vendors and programs from 9:00 a.m. until 3:30 p.m. Vendors will be available until 4:00 p.m.

HOW: This added element includes how to attend.

Sample: Pre-registration must be postmarked by a certain date and sent to: (address and to whom a check should be made or space for a credit card number and expiration date if appropriate). A refund policy must be stated. At-door registrations should be explained with price.

### **Check the media you want to reach**

- Genealogy societies
- Historical societies
- Museum calendars
- Society bulletins
- Libraries
- Senior centers
- LDS Family History Centers
- Churches
- Chamber of Commerce
- Genealogy calendars
- Radio Stations
- Community planning
- Newspapers

- Public speaking
- Local TV stations
- Heritage & Lineage societies
- Internet sites

Take a calendar with writing space and work backward from the date of the event. Decide by what date your information should be in the hands of each of the above media you intend to inform of your seminar. (Later you will go back and place on that calendar the type of material you will submit. You will also add the printing date of the information to this calendar.) After you have made your calendar, share it with the seminar chairperson so it can be approved by the other committee chairs. This allows all to know and agree on the deadline dates so no one is waiting for material to be released.

### **Types of materials**

A basic announcement flyer is usually made first. If you skip this form because of lateness or double expense, then the flyer should also contain the registration form. This form may be done by the registration chairperson and if not, be sure it is approved by that chairperson. It is nice to include a small picture of the speaker if there is only one and a sketch biography. The time schedule should also be complete on the flyer. Use the back side of the flyer for directions if needed but be sure nothing falls onto the back of the registration tear-off section. You have a choice of letter- or legal-size paper, and all copies should look the same for consistent identification. Number printed will depend on methods of distribution. If you find you need to reprint, use a different basic color. This provides you with a clue to evaluating your distribution method. The time schedule can be repeated for the schedule to be placed in the packet. Plan to give out extra flyers at meetings. (There are always folks who do read their copy where you think they should have gotten the information.)

Societies should be offered an announcement for their bulletins, along with sending their webmaster the link to the electronic version of the registration form on your society's web site.

If you have scheduled early enough, you can submit calendar items to journals, such as state journals, Heritage Quest, Forum, Genealogical Helper, etc.

To what newspapers should you submit an article? Some newspapers prefer that you do this with the Who, What, Where, etc. format instead of writing an article. Be sure it is signed and includes a telephone number. Submit a picture of the speaker if possible. You may need to send one announcement to the news department and another to the upcoming events department. Most newspapers now accept advertisements online. Check out each newspaper's web site in advance to determine their deadlines and to determine how to submit your article.

Local radio stations will take public announcements. These are usually accepted via an online form or faxed to the station. Check out the station's web site and find a contact number to call for more information on submitting your announcement if you cannot determine how to submit it via their web site.

Internet sites: Don't forget web sites! This is probably one of the best ways to get the word out. Get the information about your conference to as many webmasters as possible so that they can

link to the information on your own organization's web site. Remember to contact WSGS, state member genealogical societies, Chambers of Commerce, business journals, senior centers, libraries, etc. Be sure to include a contact person, phone number, and email address.

Some churches, museums, and historical societies will place small announcements in their bulletins. Your information should be slanted to their interests.

Be sure your date is on the Chamber of Commerce calendar as soon as you know it! If you live near another town with a chamber, use that one also.

### **Budget**

Plan a proposed budget of costs for publicity. It's a good idea to contract with a copy company to do your copying. Costs can often be reduced by using a local company and giving them plenty of lead time. Suggest that you will give them publicity or ask for a door prize or notepads, etc. for using them. Decide if you will have other ad expenses. Don't forget mailing expenses. Know how many pieces of paper you can get in an envelope for how much postage. Unfortunately, this can vary at different post offices, so know where you are going to mail things. What are your materials going to cost such as paper, envelopes, post cards, etc.? There may be some telephone calls. Have the budget approved by the seminar committee and keep receipts of expenses!

### **How many copies of what?**

There will always be something unexpected for there are many unknowns. Something will be wasted or not calculated correctly. One can only do his or her best!

Ask yourself: to how many societies do you plan to send flyers? Will you send them flat or folded? Know how many will fit into the envelope for how much postage, and send that many multiplying by the number of societies. If you are doing an announcement flyer and a registration flyer to the same addresses, that's a double expense! The best idea might be to send a few paper copies of the flyer to each society for them to copy, and make certain that the flyer includes a link to your web site where they people wishing to attend can download additional flyers. Also make certain their webmaster has a link to your site to include on their site and calendar of events.

Evaluate how many flyers you will distribute to each address, such as libraries, LDS Family History Centers, senior centers, etc. (Note: Most Family History Centers do not have mailing addresses, only location addresses, so these should be hand delivered.) You will need to know how many announcements you will send to other places as well. Be sure committee chairs have a few extra copies.

Decide early on which committee pays for the flyer with schedule in the packet? How many do you anticipate will register?

### **Other considerations**

Publicity does not need to be a one-man job, but it does need to be coordinated so that committee members are very clear on who is doing what and when. It is always best to share committee

work and teach others how committees work in order to take advantage of each member's insight and talents. The members become your next event leaders.

The chair of the publicity committee will need to communicate with all other seminar committees to let them know things are progressing and that the publicity is supporting their efforts. If one feels it is too time consuming to attend all these meetings, written or email reports can speed this along, but do ask for any feedback that might have developed during that committee meeting. The chair may also ask a member of the publicity committee to attend in his/her place and report back!

If you do use a committee, schedule your publicity meeting times at least two weeks ahead for the best possible attendance by all committee members. Let the members know on the first day if they will or will not have to be responsible for remembering that date and time, or if they can expect a reminder a few days ahead. Start all meetings on time so those that are there are not being punished for being on time!

And don't forget to have fun!