



WEEKEND TRAINING HANDBOOK

September 2016

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INTRODUCTION

CSMFO promotes excellence in financial management through innovation, continuing education and the professional development of members.

To this end, the Weekend Training provides members with education and skills necessary to carry out a high level of professionalism in the field of municipal finance. The annual two and half day event, generally held in November, is one of the activities under the purview of the Career Development Committee. Attendance will be limited to 40 people. The Career Development Committee will identify a Weekend Trainer Coordinator who will be largely responsible for handling the details of the event. The Career Development Committee will have oversight of this individual.

The following is intended to be a guide for both the Career Development Committee and staff to facilitate the planning and execution of this event.

SITE SELECTION

The location rotates north one year and south the next; opposite that year's Annual Conference. The city and venue of the Weekend Training can have a direct bearing on the event's success. CSMFO has retained a Meeting Planner to assist with site selection.

Steps for Site Selection:

March	Career Development Committee through the Weekend Training Coordinator identifies the city or cities
March	Meeting Planner submits RFP to hotels in identified areas
April	Meeting Planner reviews hotel proposals with Weekend Training Coordinator who will share and receive input from the Career Development Committee as needed
April/May	If the Career Development Committee deems it necessary, site visits occur. These site visits are to be coordinated by the Meeting Planner, but attended by no more than two (2) representatives identified by the Career Development Committee. One representative may include the local Chapter Chair who is familiar with location and can subsequently support the marketing of the Weekend Training. Costs for these site visits, if any, may be reimbursed under the Committee/Chapter Support line in CSMFO's budget, with prior approval of the Executive Committee. The Meeting Planner may be requested to attend the site visit by the Career Development Committee, but this would be at an additional staff cost, negotiated in advance and billed to the Committee/Chapter Support budget line item.
May	Site is selected and Meeting Planner negotiates contract
May/June	Hotel contract is submitted to the Board for approval

Site Selection Helpful Hints

The CSMFO Weekend Training Site Selection will be decided pending desired amenities. The important thing to remember when considering facilities is to put oneself in the participants' shoes, and try to determine what things they will or won't appreciate. Some items are requirements, others are merely desirable. Some of these include:

- Adequate and well-flowing meeting space
- Adequate number of hotel rooms in reasonable proximity to host hotel/facility
- Quality and conditions of meeting space
- Quality and condition of hotel rooms
- Hotel affordability
- Location (is the city/location a draw for the members?)
- Transportation (convenience to major airport, shuttle availability, affordability)
- Location relative to leisure activities
- Direct billing must be made available

Desirable Criteria To Be Evaluated

In addition to the helpful hints, desirable criteria for the Weekend Training Program include:

- Single/Double Rooms for 35-40 Guests at 125% of the government per diem rate of tax/resort fee/other special charges
- Minimum room nights NTE 50
- Food and Beverage Minimum NTE \$3,600 inclusive of tax/tip
- Lunch menu NTE 150% of government meal rate inclusive of tax/tip, Dinner menu NTE 150% of government meal rate inclusive of tax/tip
- Separate Meeting Space (no less than 1,500 sq. ft.) able to accommodate 40 Class Room Style, at no additional charge with minimum room night pickup
- Audio Visual (Screen, Cart, electrical) at a 10% discounted price from usual hotel price
- Overnight/Daily Parking NTE 20% of room rate
- Other Concessions as appropriately negotiated

BUDGET AND PRICING

The Career Development Committee is responsible for developing a budget for the Weekend Training, which it should present to the CSMFO Board of Directors for approval by July of each year. The budget projections should provide for the Weekend Training to break-even financially.

With the draft budget submission, the Career Development Committee should also seek the Board's approval for the Weekend Training rate(s). The cost of attending should include two nights' stay (Friday and Saturday). The option of adding the Thursday and/or Sunday night should be made available and will be the responsibility of the registrant. The cost of the additional night(s) must be at least equal to, and no greater than twenty-five dollars (\$25) more than, the cost of the negotiated room rate per night. There should also be a "Commuter Rate" option, for those not wishing to utilize the overnight lodging.

PROGRAM DEVELOPMENT

The Career Development Committee is responsible for developing the program/agenda for the Weekend Training. Unless otherwise stated, steps below are the responsibility of the Career Development Committee.

In order to maintain the lowest cost possible for the Weekend Training, all speakers are requested to donate their time. Every effort should be made to minimize the cost to the speakers by selecting those with close proximity to the location of the training. If the program requires a paid speaker, the cost should be included in the draft budget presented to the Board. If the need is determined after the budget approval, the Career Development Committee will need to seek an amendment to the budget prior to the event.

Steps for Program Development:

August	Draft agenda completed
August/September	Contact all speakers
September	Collect speaker confirmations, including bios, AV needs and W9 (if being paid). Forward copies of bios and W9s to SMA staff; submit AV needs to Meeting Planner
September/October	Budget amendment, if needed
October	Collect copies of presentation/handouts from speakers

MARKETING

Once the program and budget are finalized, marketing should take place. This should consist of both a flyer, to be emailed to members and posted on the CSMFO website, and continuing email reminders up until the deadline to register. The Career Development Committee is responsible for developing the marketing collateral, but may utilize staff at SMA to help draft/design and distribute the flyer and any necessary emails.

Career Development Committee may contact the local Chapter Chair to assist in the marketing of the Weekend Training to encourage participation.

REGISTRATION

Pre-Registration is strongly encouraged to ensure that adequate planning and arrangements are made to accommodate each person's hotel, meals and materials. The Weekend Training Coordinator may accept Late Registrations (after the registration deadline) if it is determined there is available space to accommodate. On-site registration is not available.

Registration for the Weekend Training is to be handled by SMA staff. Once the dates and fees are finalized, the Career Development Committee should submit this information to SMA staff to open online registration. As a general rule, online registration should be opened no later than six

(6) weeks prior to the event SMA staff should provide periodic updates of registration numbers to Weekend Training Coordinator to allow the Career Development Committee to monitor the participation. The Weekend Training Coordinator may seek additional marketing efforts to boost participation. . The information on the registration page regarding the event can be continually updated as the program develops. These updates should be sent to SMA staff to ensure proper posting. The deadline to register shall be decided upon the discretion of SMA staff, but generally in conjunction with the hotel deadline to submit the rooming list (review current hotel contract for details). Career Development Committee should be allowed to concur on the registration deadline.

Immediately following the registration deadline, SMA staff will submit a master rooming list to the Meeting Planner and the Weekend Training Coordinator; SMA staff will submit CPE certificates and registration list, to Weekend Training Coordinator. If there are outstanding amounts due, SMA staff is to resolve prior to Weekend Training event.

HOTEL ARRANGEMENTS

Rooming Lists

The Meeting Planner is responsible for submitting the master rooming list to the hotel by the deadline stated in the contract.

Meal Choices and Quantities

The Weekend Training Coordinator is responsible for choosing the meal options provided to participants, generally breakfast and lunch for two days. When deciding upon the menu, the cost should be calculated including the tax and service charge (both outlined in the hotel contract), understanding that the service charge is taxable. Where possible, every effort should be made to negotiate Government Per Diem menu pricing.

The cost for the final food choices and quantities should be within that line in the Weekend Training budget approved by the Career Development Committee. The quantities ordered should not exceed the number of attendees registered, speakers and coordinator(s) and may, in fact, be less. The Meeting Planner may be consulted on determining quantities prior to communicating same to the hotel.

If the cost of the food exceeds the budgeted amount (if, for instance, there are more attendees than anticipated), the Career Development Committee Chair has the authority to approve additional monies for that line item. In the report to be presented to the Board a final budget versus actual accounting of the event should be distributed with explanations that explain the variance.

SPEAKER GIFTS

Speaker gifts may be provided and purchased in advance, provided the cost of same was included in the budget as presented to and approved by the CSMFO Board of Directors.

ON-SITE COORDINATION

One (1) volunteer, as identified by the Career Development Committee, may provide on-site coordination for the Weekend Training. This volunteer would be responsible for checking people in at the door; adhering/following the agenda, including speaker time limits, breaks, and lunch and dinner; monitoring the morning and afternoon CPE sign in list and distributing CPE certificates at the end of the course.

This same volunteer (1) may be provided complimentary registration, including up to two (2) nights' lodging, provided the cost of same was included in the budget as presented to and approved by the CSMFO Board of Directors. Depending on the location of the event, the night before may be also be provided in order to ensure that the hotel and room are ready for registration the next morning.

MODERATING

A volunteer assigned to provide on-site coordination should also plan to moderate the Weekend Training, welcoming the speaker, providing speaker introductions and generally ensuring the room is set correctly and is comfortable.

HANDOUTS

SMA staff may be utilized to create handouts (typically binders), including the speaker presentations and extra pages for notes. SMA staff may be utilized to create a cover page for the binder as well, if requested. The number of handouts created in advance should be equal to the number of registered attendees.

DINNER FUNCTIONS

Friday and Saturday dinners are included with the cost of the Full registration only, Commuter registration does not include dinners. One is generally at the hotel; the other generally offsite. The Weekend Training Coordinator may utilize the services of the Meeting Planner to assist with any dinner functions being held at the hotel. The cost of the dinner functions shall be included in the budget submitted to the Board of Directors for their approval.

EVALUATIONS

The Career Development Committee should develop an electronic evaluation form to survey the attendees on the event. The evaluation should include questions regarding the hotel accommodations, the speaker (both presentation skills and knowledge of subject), ease of preregistration, value of event for the cost, etc. This should be conducted as soon after the event as possible, but generally not more than 30 days after the event.

REVIEW OF HOTEL BILL

Both the Weekend Trainer Coordinator and the Meeting Planner should review the bill for accuracy prior to any payment to be made. Any items of concern shall be communicated to the hotel through the Meeting Planner. Direct billing is to be used and shall be a site requirement.

REPORTING

The Career Development Committee should develop a report to present to the CSMFO Board of Directors in either December or January that outlines the event program, provides a budget versus actual financial report, summarizes the event evaluations and provides direction on the following year's Weekend Training.

APPENDIX: TIMELINE

<u>MONTH</u>	<u>ITEM</u>	<u>RP</u>
March	Identify city or cities	CDC
March	Submit RFP to hotels in identified areas	MP
April	Review hotel proposals	CDC/MP
April/May	Site visits (if deemed necessary) occur (coordinated by MP)	CDC
May	Site is selected	CDC
May	Contract negotiated	MP
May/June	Hotel contract is submitted to the Board for approval	CDC
July	Present budget to Board for approval	CDC
August	Draft agenda completed	CDC
August/September	Contact all speakers	CDC
September	Open event registration	SMA
September through November	Market the event	CDC/SMA
September	Collect speaker confirmations	CDC
September	Submit bios and W9s to SMA staff	CDC
September	Submit AV needs to MP	CDC
October	Collect copies of presentation/handouts from speakers	CDC
October/November	Close event registration	SMA/CDC
November	Send master rooming list to hotel	MP
November	Registration list, CPE certificates, name tags, and copy of master rooming list to CDC/Weekend Training Coordinator	SMA
November	Purchase speaker gifts, if any	CDC
November	Finalize menu selections and quantities	CDC
November	Submit BEOs to hotel	MP
November	Copy of executed BEOs to CDC/on-site volunteers	MP
November	Create handouts/binders	CDC
November	Create and distribute online survey	CDC
November	Review/pay hotel bill	CDC/MP
December/January	Report to Board	CDC

Legend:

SMA – Smith Moore & Associates

MP – Meeting Planner (on SMA staff)

CDC – Career Development Committee / Weekend Training Coordinator