



ANNUAL CONFERENCE HANDBOOK

Revised June 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 Annual Conference provides all members with education and skills necessary to carry out a high level of professionalism in the field of municipal finance.

CONFERENCE SITE SELECTION COMMITTEE

The annual three-day conference, generally held in February, is one of the most important activities of CSMFO. The city and venue of the Annual Conference has a direct bearing on the event's success. The CSMFO Board of Directors, in recognition of the Conference's importance, has created the Conference Site Selection Committee to oversee the site selection process.

RESPONSIBILITY OF THE CONFERENCE SITE SELECTION COMMITTEE

The Conference Site Selection Committee is responsible for recommending Conference sites to the Board of Directors, as well as providing assistance for the Conference. Such assistance should include reviewing the hotel proposals with the meeting planner, on-site visits during the planning process and assisting the Host Committee as requested. The CSMFO President appoints the Chair, Vice Chair(s), Senior Advisor(s) and Board Liaison of the Committee. The Board of Directors has authorized employing the services of a professional meeting planner to assist in site selection and Conference planning and negotiations.

The Chair is also responsible for contacting the Finance Director of the City selected and maintaining a line of communication regarding local participation.

SITE SELECTION POLICY

Conference sites are selected, when possible, three to four years in advance. It is important to alternate Conference sites throughout the state. Historically, Conferences have been rotated to correspond with the section of origin of the CSMFO President; i.e., if the President-Elect being installed as President at the Annual Conference is from the northern part of the state, the Conference will be held in Northern California. The same holds true for Southern California. From time to time, the Board of Directors, depending on circumstances at the time, may choose to deviate from the north-south rotation policy. This decision can only be made by a vote of the CSMFO Board of Directors.

PROCESS FOR SELECTING CONFERENCE SITE

The Conference Site Selection Committee is responsible for determining the potential city(ies) for the Conference. The professional meeting planner will solicit proposals for the Committee to review, and after the site visits are completed and the proposals reviewed the Committee will make a recommendation to the Board of Directors.

Hotel proposals are to be reviewed by the Conference Site Selection Committee and site visits should be coordinated for each hotel with adequate facilities. CSMFO will bear the expense of travel and lodging for the Conference Site Selection Committee, meeting planner and/or his/her representative, and the Executive Director or his/her designee. Whenever possible, the venues being visited should provide lodging and meals, and travel costs should be kept to a minimum. The Conference Site Selection Committee may use the “Site Tour Instructions and Helpful Hints” (Exhibit A) as a tool to determine its recommendation to the Board of Directors.

MEETING PLANNER SERVICES

The meeting planner provides site selection assistance, negotiates with vendors on behalf of CSMFO, and assists in all ways and activities necessary to conclude the selection of site locations for the Conference. Meeting planning services will be contracted in conjunction with overall management services for the organization. The Board of Directors is responsible for these contracts. It is the responsibility of the consultant to monitor the scope of services, and bring to the attention of the Host Committee any items being requested that fall outside the contract. Listed below is a brief overview of services being provided, and shall not in any way supersede the contracted scope of work.

PRIOR TO CONFERENCE – The meeting planner will be available to answer questions, meet with Board/committee members, and deal with any issues/problems that arise prior to Conference. As described in more detail below, planner will (with the direction of the committee/Board of Directors):

- Provide site selection assistance
- Negotiate final contract with host and overflow hotels
- Negotiate with hotel on food/beverage needs
- Ensure adequate meeting space for anticipated program
- Check banquet event orders and give final guarantees
- Negotiate for entertainment, and/or decorations as needed
- Arrange Board/committee travel arrangements for site selection
- Make hotel arrangements, when necessary

DURING CONFERENCE – The meeting planner will be available to provide complete oversight of Conference, including but not limited to:

- On-site 24 hours a day to answer questions
- Meet with Host Committee/Board members
- Attend a pre-Conference meeting with all appropriate hotel personnel to advise them of any last minute program changes and to review entire program
- Meet with banquet/convention services manager to review final details
- Coordinate with Program Committee on each meeting room to ensure food/beverage and audio/visual needs are as ordered and meeting room is set according to requested requirements (or manage volunteers to assist with process, especially during concurrent sessions)
- Work with Host Committee/Board to set up and oversee the registration desk
- Review the hotel bill to validate all charges

POST-CONFERENCE – The meeting planner will meet with current and future Board/committee members for a “debriefing” of the Conference and make any recommendations for future Conferences. The meeting planner will also conduct a survey of attendees and exhibitors/sponsors to evaluate the Conference.

CSMFO CONFERENCE POLICIES

Over the years, a number of Conference policies have been approved by the Board of Directors to help the Annual Conference Host Committee in planning the Annual Conference. These policies are reviewed by the Board on a regular basis. The Host Committee may make recommendations for review or edit of existing policies; however, until a policy amendment is approved by the Board of Directors, the existing policy must be followed. Board policies pertaining to the Annual Conference are listed below.

POLICY ON CONFERENCE STAFF

CSMFO shall have, at a minimum, five (5) staff members present at the Annual Conference; at a maximum, CSMFO shall have no more than one staff member per 100 registrations (or portions thereof). CSMFO will provide each of these staff members lodging for up to four (4) hotel nights, reimbursement for travel to and from the event, and meals during the length of stay.

POLICY ON WAIVER OF CONFERENCE FEES AND HOTEL FEES

The President, President-Elect and Past President shall be provided upgraded hotel rooms during the Conference, if they are available. The incoming President shall be provided the Presidential Suite (or comparable suite) at no cost to the President. The Conference Site Selection Committee shall strive to procure the Presidential Suite for the incoming President as part of the hotel

contract. The President, President-Elect and Past President are required to pay the normal Conference registration fee; the President-Elect and Past President are required to pay their own hotel accommodations. Past-Presidents who are retired and are no longer working, inside or outside of government, are not charged for Conference registration. They are expected to pay for their hotel accommodations.

Up to fifteen (15) Host and Program Committee members may receive either complimentary conference registration or three free hotel nights during the week of the Conference. The Host Committee Chairs shall determine which, if any, Host and Program Committee members receive this benefit; however such decision should be based on the level of participation and commitment leading up to the Conference.

All other CSMFO members attending the Conference shall pay the appropriate Conference registration fees and hotel room rates.

Those exempt from paying both Conference registration fee and hotel fee are:

1. An official representative of the Municipal Finance Officers Associations from the states of Alaska, Oregon and Washington
2. The President of California Municipal Treasurers Association or designee
3. The President of GFOA or designee
4. Speakers who do not otherwise attend the Conference (speakers receive one night hotel's stay and the day of their speaking engagement complimentary, unless otherwise negotiated by the Program Committee)

The exemption from paying hotel room rates shall not exceed three nights.

POLICY ON HOTEL SUITE ASSIGNMENT

If upgraded rooms are available, they shall be assigned based on the following priority:

1. Incoming President (Presidential Suite or equal)
2. Co-Chair of Host Committee
3. Incoming President-Elect
4. Immediate Past President
5. CSMFO Board Members
6. CSMFO Staff

Even if some of the above have comped rooms, if upgraded rooms are available, then they should be assigned in the above order. The above list is strictly for use in determining who shall be assigned to suites if they are available. This depends on what is available at the hotel and what is negotiated in the hotel contract.

POLICY ON REIMBURSING CONFERENCE SPEAKERS

All requests for expense reimbursements of conference breakout speakers should be submitted no later than thirty (30) days after the completion of the Annual Conference and should use the following format:

Hotel – the amount should not exceed the cost secured at the discounted hotel rate at the Conference.

Meals – the amount should follow the guidelines set forth by the IRS for meals.

Airfare – the amount should not exceed the “coach” rate of the airline being used.

Expense reimbursements for keynote speakers may differ from the above, as negotiated per their contracts by the Program Committee.

POLICY ON HOSTED RECEPTIONS

All Conference receptions and cocktail parties shall be hosted by the incoming CSMFO President or his/her designee and shall be charged to the Annual Conference budget.

The hosted receptions include the opening reception and a brief reception, if appropriate, before or after the banquet or evening event. Any deviation from this schedule that would affect the Board-approved budget must be revisited for approval by the Board.

POLICY ON HOSTED DINNERS

The Host Committee is responsible for planning all required dinners during the Conference. All expenses associated with the dinners shall be charged against the Conference budget.

The required dinners are:

1. Presidents Dinner
2. Banquet or equivalent
3. Other dinners approved by CSMFO Board of Directors.

Those to be invited to the hosted dinners:

President’s Dinner (Host - Incoming President)

Past-Presidents, Board of Directors, Staff (up to 10 total, with guests), out-of-state guests, all members of the Host and Program Committees, Standing Committee Officers, Chapter Chairs, GFOA President or his/her representative, President of CMTA or his/her representative, President of LOCC Fiscal Officers Division. All of the above invitees may bring a guest. The Incoming President may, at his or her discretion, invite up to an additional ten (10) guests, provided the event conforms to budgetary restrictions. If there are sponsors for the dinner, the number of representatives invited to the dinner will be concurrent with the published sponsorship levels.

Banquet or evening event (Host - Incoming President)

All Conference attendees.

POLICY ON BANQUET OR EVENING EVENT

The evening event of the Conference is intended as a social event, such as a banquet, however the Host Committee may develop other types of evening events to encourage social interaction.

POLICY ON USE OF PRESIDENT'S HOSPITALITY SUITE

It is customary for the incoming President or Host Committee Co-Chair to have available for his or her use, a hospitality room. In some cases, this can be part of the President's Suite. In other cases, it may be a separate room apart from the President's Suite. The use of the room is at the discretion of the President; however, customarily the room is used for social events hosted by the President and the Board of Directors. Expenses associated with the hospitality room shall be charged to the Conference budget.

PROGRAM COMMITTEE RESPONSIBILITIES

ANNUAL CONFERENCE PROGRAM

The purpose of the Program Committee is to set the educational content of the Annual Conference. The committee coordinates all speakers, with the exception of the opening keynote, which is coordinated with the Incoming President.

The Program Committee should handle the following:

1. Developing Annual Conference program topics and schedule with review by the Host Committee.
2. Arranging for speakers and negotiating speakers' contracts within the approved Conference budget.
3. Creating captivating titles for each of the sessions. (Ask speaker first; however, many appreciate assistance in creating a title that is appealing to our particular audience.)
4. Obtaining from each speaker:
 - a. Audio-visual equipment needs (see form) and a signed taping permission form, as applicable, from each speaker to provide to the Host Committee.
 - b. Employee Identification Number or Social Security Number on a W-9 form. The State of California now requires withholding on speakers who do not reside in California. Forward the W-9 or other tax forms and speaker fee amounts to CSMFO staff, who issues the 1099s for speakers.
 - c. A short biography.
 - d. Handouts should be posted on the CSMFO website, in advance if possible. Should a speaker insist on hard-copy handouts, the speaker must coordinate and bear the cost.

5. Arranging for the moderators for each of the sessions, including moderator confirmations and distributing instructions and speaker bios. Submit the list of moderators to CSMFO staff.
6. Coordinating with Host Committee all special arrangements and estimated costs for the speakers, including transportation, hotel rooms and other incidentals.
7. Reporting to the Host Committee the status of speakers' arrangements and the budget.
8. Meeting, greeting and directing general session speakers to their sessions on the days of the Conference. Other speakers may check in at the registration desk.
9. Sending thank you letters to all speakers.
10. Making regular update reports to the CSMFO Board on the status of program content, selection and confirmation of speakers.

COORDINATION WITH HOST COMMITTEE

One of the Program Committee members shall be designated the liaison between the Program Committee and the Host Committee.

PRE-CONFERENCE TRAINING

The Program Committee selects the topics and speakers for the pre-conference training. Any fees associated with the pre-conference training (speaker fees, audio visual, etc.) will be communicated to the Host Committee and meeting planner. Revenue and expenses for the pre-conference training are included in the overall Annual Conference budget. The Host Committee is responsible for all hotel logistics associated with the pre-conference training, while the Program Committee is responsible for speaker coordination. Registration fees for the pre-conference training are established by the Program Committee, and shall at minimum be set to break even on the session. Pre- and on-site registration is handled by CSMFO staff. The Host Committee, or designated chair, arranges for pre-conference participants to be able to pick up their full conference registration packet upon arrival at the pre-conference.

Helpful Hints:

1. Working with a speakers bureau:
 - Program Committee may work with as many bureaus as desired, though it may get confusing to use more than two.
 - The bureaus will want to know general topic areas for which a speaker is required and a budget for each. Video clips are often available on websites.

- Program Committee may request that the bureau contact specific speakers even if they are not on their current list, though the committee may want to try to contact speakers directly to obtain a lower price.
 - The fees quoted by the bureaus are usually negotiable.
- 2. Legislators and their staffs are high-risk speakers, as they often have to cancel the engagement at the last moment. If booked, be sure to have a backup in case of cancellation. The people sent to fill in may not be people you want.
- 3. Taping permission form, if taping, is required and must be personally signed by the speakers. Emailed approval is not sufficient. Information should be forwarded to the Host Committee.
- 4. After all speakers have informed of their audio-visual needs, communicate same to meeting planner. The meeting planner will negotiate packages as necessary.
- 5. Let the CSMFO members assist in suggesting topics for concurrent sessions by means of a Call for Presentations. They know what they want to learn about and have great ideas. The email list is an easy way to do this. Also, use the Career Development Committee for ideas/feedback.
- 6. Getting moderators can be a time-consuming task. Scholarship recipients will be tasked with moderating or room monitoring; Chapter Chairs, Committee and Board members are also good places to start. Personal phone calls seem to work the best. Start early.

HOST COMMITTEE RESPONSIBILITIES

The Host Committee and the meeting planner are responsible for the production of the Annual Conference. The President-Elect (the person that will be installed as President of CSMFO at the Conference business meeting) serves as Conference Co-Chair, along with, generally, a CSMFO member from the area hosting the Annual Conference.

Listed below are the normal responsibilities of the Host Committee. Each Host Committee may organize differently; however, someone must be responsible for the following assignments:

HOST CHAIR RESPONSIBILITIES

1. Overseeing the overall Conference and Host Committee activities.
2. Appointing the Host Committee.
3. Developing Conference budget, in coordination with the meeting planner, and submitting it to the CSMFO Board for approval at the meeting held in conjunction

with the annual Planning Session.

4. Providing oversight of financial management and recordkeeping for the Annual Conference, in cooperation with CSMFO staff.
5. Making regular update reports to the CSMFO Board on the status of hotel negotiations, registration and sponsorship numbers and other financial reports as needed.
6. Providing to the Board of Directors, by no later than May 1 following the Conference, a final financial accounting of all Conference activities.

Helpful Hints:

1. Special Meetings are frequently requested during the Annual Conference. These meetings often are related to special projects and goals planned by the Board. The Host Committee Chairs should encourage Board and committee members to identify any such meetings when the budget presentation is made at the CSMFO Board meeting in the fall.
2. Standing Committee meetings that are scheduled during the Annual Conference should be noticed by Committee Chairs.
3. Other events such as a golf tournament, tennis tournament, tours, organized walk, aerobics, etc., are acceptable. Scheduling of such events is up to the Host Committee. It should be noted, however, that assistance with such events is not included in the meeting planner or management contracts, and may be subject to additional fees should the event(s) not be completely managed by volunteers.
4. Invitations to out-of-state guests and other VIPs should be mailed no later than three months in advance of the Conference. Keep in mind that guests are probably not familiar with the Conference city. The invitation should include information about the area and any special events during the Conference. Each out-of-state guest should be assigned someone to assist them and ensure they know where they are to sit, what is expected of them, when they will speak, etc., as well as be sure they are made welcome.
5. Invitations to the President's Dinner should be sent approximately six weeks in advance of the event. If the Dinner has a sponsor(s), include appropriate logos on the invitation. See the "Hosted Dinners" section for more information.

CONFERENCE MATERIALS

1. After consultation with the Host Committee, the meeting planner should work with the graphic designer to design the logo and create the brochure for the event. The logo and brochure are both subject to Host Committee review and approval. Brochures are posted to the website and should be distributed electronically to all available email addresses by mid-November for a mid-February Conference.
2. CSMFO contracts with a third-party provider to print name badges that work with scanners at session doors to electronically log CPE hours. CSMFO staff prepares registration packets for pick-up on-site, including tickets and ribbons. Registration is done using the association's database, and is maintained by CSMFO staff.
3. The CSMFO meeting planner will coordinate preparation of materials to be handed out at the Conference registration desk, including conference gifts, on-site program, pocket program, list of attendees, etc.
4. CSMFO staff prepare packets for the room monitors to pick up at the registration desk. The packets include: meeting room/location, instructions, event sheet, copies of the speaker bios, speaker name tent card(s), speaker gift(s), and the name of the moderator.
5. CPE hours are tracked using name badges in conjunction with electronic scanners outside each educational session where CPEs are available. Attendees can log in to a site after the event to print a certificate listing their total CPEs for the Conference.
6. After the event, the meeting planner will create and distribute to all attendees an online survey to evaluate the success of the event.

Helpful Hints

1. Registration forms should include an area for special needs.
2. Registration forms should be distributed as possible to non-CSMFO members.
3. Whenever possible, registration materials should be provided to the Board of Directors prior to the Conference.

CONFERENCE ON-SITE REGISTRATION

1. On-site Conference registration is primarily handled by CSMFO staff. Staff may solicit volunteers to assist as they deem necessary.
2. At Conference registration, staff will check to ensure that proper registration fees have been paid and collect any unpaid fees.

3. Meeting planner should ensure extra materials are available for on-site registrations.
4. Registration should stay open throughout the Conference to ensure attendees can get their registration materials, name badges and event tickets.

CONFERENCE LOGISTICS

1. Meeting Planner should contract with the audio-visual service to provide the requested equipment for general session speakers as well as the equipment for each of the breakout rooms. If it is determined that the Conference sessions will be taped, the meeting planning may arrange for a vendor to tape the sessions. The meeting planner should negotiate all audio-visual (A/V) contracts.

The meeting planner will work closely with the Program Committee to determine the A/V needs of each speaker and will make arrangements for the proper equipment in each room. The breakout session equipment will be standard; keynote speakers may request special A/V needs.

2. The meeting planner should keep the hotel/convention center management posted on any schedule changes, and ensuring that dining rooms are ready on schedule.
3. The meeting planner should coordinate with hotel staff during Conference to ensure that:
 - Seating arrangements are satisfactory
 - Lighting arrangements are adequate
 - Refreshments are sufficient in rooms
 - Heating and air conditioning are working properly
 - Flipcharts or other audio or visual aids are available and in place at proper time.
4. The Scholarship Subchair appoints room monitors for each session, whose responsibility it is to report any equipment failures, notify staff of any room needs (additional chairs, temperature changes, refreshment needs, etc.), place appropriate signage and speaker identification name tents, etc. The Scholarship Subchair is required to utilize conference scholarship recipients as room monitors, although not exclusively; the list is then provided to CSMFO staff.

It is recommended that sufficient volunteers are recruited to provide at least one person for each event (see room monitors above). The event person will be the eyes and ears of the session and help to ensure the event's success from a logistics point of view.

CONFERENCE EVENTS

1. Work closely with the meeting planner on the following:
 - a. All meals including any for the Pre-Conference
 - b. Refreshments for breaks including any for the Pre-Conference
 - c. The banquet or special event theme, food, entertainment, decorations
2. Meeting planner should provide the food guarantees (numbers of persons to be served) for breaks and for each meal.
3. Meeting planner should communicate any special dietary needs to the hotel staff.

CSMFO VENDORS/EXHIBIT HALL

CSMFO vendors, sponsors and exhibit hall logistics are handled by the Meeting Planner.

1. Review prior year conference vendor/exhibit notes and forms.
2. Determine hours of exhibit hall. This is a key issue with vendors and plays an important role in their decision to participate.
3. Prepare vendor registration form.
4. Non-profit organizations may choose to exhibit at the lowest level for a discount of 25% off the regular fee for that level. This discount is only available at the lowest level. Any non-profit organization desiring a higher level of participation is required to pay the stated fee for that level.
5. Prepare vendor solicitation letter with key data about Conference. Keep to one page. Establish sponsor level amounts and other rates with approval by Host Committee.
6. Contact booth provider and determine what items are provided with the booth and what items are costed separately, to be paid by the vendor/exhibitors (e.g., wastebaskets, chairs, tables, etc.)
7. With booth provider, determine layout of the Exhibit Hall, and get fire marshal approval of floorplan. Keep Conference attendees mingling as much as possible in the Exhibit Hall by scheduling the snack breaks, continental breakfast, and “happy hour” events in the Exhibit Hall.
8. Have booth provider prepare an Exhibit Hall floor plan that can be updated as registrations are processed and posted on the CSMFO website. Update regularly!
9. Send a confirmation to each vendor once they have registered for a booth. Do not reserve a booth until payment is received.

10. Determine how to recognize the vendors that contributed at the higher levels. Exhibit booth providers may be able to include their names and logos on signage.
11. At the Conference during the Exhibit Hall hours, keep in contact with the vendors to make sure they have everything they need.
12. After the Conference, follow up with a satisfaction survey.

Helpful Hints:

1. Vendor activities should not conflict with scheduled Conference events. The Host Committee must make a special effort to notify vendors of this policy and to make them aware of which night is left 'open' for vendor receptions, etc. Make sure that the hotel notifies the meeting planner if a vendor rents a room for hosting some event.

CONFERENCE ITINERARY

The Host Committee, in collaboration with the Program Committee, is required to prepare or have Meeting Planner prepare a Conference Itinerary, which documents every event that occurs during the entire Conference. The Itinerary should detail for the Board members and other identified leadership any times and places they are recommended to be in attendance. In addition, a President's Itinerary shall be created by CSMFO staff and/or the contract meeting planner, to assist him or her in Conference preparations.

Helpful Hints:

1. Conference Itinerary should include a list of out-of-state guests, CMTA President, GFOA representative, LOCC Fiscal Officers Division President and their traveling companions.

CONFERENCE SCHOLARSHIPS

The Host Committee shall identify an individual from within the committee to coordinate Conference scholarships. Such individual shall work with CSMFO staff to create the necessary forms, post said forms on the website and solicit applications from the membership.

1. Funding for a minimum of 10 full scholarships is to be included in the Annual Conference Budget with additional funding at the discretion of the Host Committee based on Annual Conference Budget approved by the Board.
2. The Host Committee will manage the scholarship process and selection of the recipients.

3. The scholarship application period shall run from initial registration date to a date previous to the early-bird registration deadline, as determined by the Host Committee. Host committee is to provide notice to all applicants within two weeks.
4. Scholarship recipients must be a government member of CSMFO in the year the conference is to be held.
5. Recipient must not have received a scholarship from CSMFO in the past 18 months.
6. An agency shall not receive scholarship more than 3 times in 5 years.
7. Applicants must make a financial hardship statement on the application.
8. Scholarship recipient must be the only attendee from their Agency to attend.
9. To encourage involvement in CSMFO Committee and Chapters, applicants are to express their involvement or desired involvement with CSMFO on the application form.
10. Scholarship recipient will be a room monitor for 2 break-out sessions or otherwise volunteer at least 3 hours at the Annual Conference as identified by the Host Committee.
11. Scholarship recipient is eligible to receive conference registration and up to two nights of hotel accommodations. The two hotel nights covered by CSMFO begin on the day of the first General Session and are at the conference's overflow hotel. Should there be no overflow hotel, accommodations will be at a hotel determined by the Host Committee. The recipient or his/her agency will be responsible for travel to/from conference, additional nights of hotel accommodations, pre-conference sessions, and all other incidentals.
12. Should more applications be received than budgeted, the Host Committee will provide preference for first time attendees, first time applicants and/or the potential recipient's involvement with CSMFO.
13. At the Host Committee's discretion, the application period can be extended if all scholarships have not been awarded.
14. Should the applicant live within 30 miles of conference, they will be encouraged by the Host Committee to commute to conference to provide additional funding for other scholarships.

UPDATE OF ANNUAL CONFERENCE HANDBOOK

The Host, Program and Conference Site Selection Committees should make recommendations to the Administration Committee for updates of this handbook, as deemed necessary.

The Administration Committee will periodically review this Handbook, but is required to review the Handbook after execution of any contracts, such as Management and/or Meeting Planner contracts, that may alter the content of the Handbook. Should this Handbook ever be in conflict with any contracts, the contracts shall prevail.

CSMFO ANNUAL CONFERENCE THEMES

2016	Anaheim	A Finance Life For Me
2015	Monterey	The Changing Tides of California Finance
2014	Palm Springs	Playing the Next Round
2013	Oakland	California Finance...And All That Jazz
2012	Anaheim	Soarin' Over California Finance
2011	Burlingame	Change is the Name of the Game of Public Finance
2010	Los Angeles	LA Live
2009	San Francisco	Climbing the Hills of Public Finance
2008	Anaheim	The Wonderful World of Finance
2007	Modesto	50 Years of Fabulous Finance
2006	Palm Springs	Rising to New Heights in Finance
2005	Burlingame	Bridging our Financial Future
2004	Long Beach	Navigating Financial Currents
2003	Sacramento	The Capitol Connection
2002	San Diego	Surfing the Waves of Change
2001	San Jose	A Finance Odyssey
2000	Pasadena	Expanding Horizons in Government Finance
1999	Monterey	Sailing into the New Millennium
1998	Newport Beach	An Ocean of Opportunities
1997	Pleasanton	Harvesting Prosperity
1996	Burbank	Lights, Camera, Finance
1995	San Luis Obispo	Finance Off Ramp to the Information Highway
1994	Riverside	Financial Futures: Survival of the Fittest
1993	Santa Clara	Meeting with a Mission: Strategies and Tactics for the Business of Government
1992	Long Beach	Finance is Management
1991	Millbrae	Ethics, Excellence, Success
1990	San Diego	Setting Sail toward Excellence
1989	Santa Rosa	Uncorking the '90s
1988	Anaheim	Managing for the Future
1987	Fresno	Sharing the Best
1986	Claremont	Quest for Knowledge
1985	San Jose	Going for the Gold
1984	San Diego	The Challenge of Change
1983	Sacramento	Innovation of the '80s
1982	Anaheim	Cost Effectiveness in the '80s
1981	Santa Clara	California's Great American Cities
1980	Oxnard	Changing with a Changing World
1979	Oakland	(no file)
1978	San Diego	(no file)
1977	Monterey	The Future - Pro-Active or Active?
1976	Long Beach	Future Fiscal Shock

1975	Sacramento	New Thoughts for the Soaring Seventies
1974	Pasadena	The Making of a Vice President - Finance
1973	San Mateo	Municipal Finance - Big Business
1972	Newport Beach	Team Management to Meet the Fiscal Crisis
1971	Monterey	Where Do We Go From Here?
1970	Beverly Hills	Partners in Progress
1969	Oakland	Urban Problems - Revenue Reform
1968	Palm Springs	The City - Not the Department
1967	Palo Alto	
1966	El Segundo	
1965	Sacramento	
1964	Santa Barbara	
1963	Fresno	
1962	Fresno	
1961	Fresno	

Exhibit A

Site Tour Instructions and Helpful Hints

The CSMFO Annual Conference Site Selection will be decided pending desired amenities. The important thing to remember when touring 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:

The following are all mandatory requirements for the CSMFO Annual Conference Site Selection:

- Adequate and well-flowing meeting space
- Adequate/expansive exhibit hall space
- Adequate number of hotel rooms in reasonable proximity to host hotel/facility

The desirable criteria to be evaluated are:

- Attendees can all meet in one facility
- Quality and conditions of meeting space
- Most of the hotel rooms shall be in one facility (with some overflow to an immediately adjacent hotel)
- Quality and condition of hotel rooms
- Hotel affordability (room rate < \$200.00)
- Location (is the city/location a draw for the members?)
- Transportation (convenience to major airport, shuttle availability, affordability)

Bonus criteria consists of:

- Location relative to leisure activities
- Golf Course availability
- Guest Activities
- Host City/Chapter willing to provide support

Some items to consider while looking at sites:

- Reviewing the location of meeting space to determine if the flow for general session, breakouts and especially our exhibitors works for us.
- For the convention centers: Are there areas for networking and easy flow for attendees?
- Does the hotel have the correct "feel" for our attendees? Does it have the corporate feel we want? Is it "worn" in any way that we cannot live with? Does it have networking areas after hours? Are we comfortable with locations where we may have to use more than one hotel?