

## SOUTHWEST UNITARIAN UNIVERSALIST WOMEN (SWU UW) CONFERENCE GUIDELINES

### I. SOLICITING CONFERENCE SPONSORS

At each conference SWU UW Officers will solicit sponsors of future conferences and provide information on how to sponsor a SWU UW conference.

SWU UW will make announcements in each issue of the newsletter, to contact one of the officers if they are interested in sponsoring a conference.

SWU UW will make available a document "Conference Guidelines" which will provide details on how to sponsor a conference.

SWU UW will make available to those sponsors who have been accepted, "Procedures for Putting on a Conference."

SWU UW will make a section of the web to provide the above documents for download.

### II. SO YOU ARE THINKING ABOUT SPONSORING A CONFERENCE?

SWU UW is interested in planning conferences as far as three years ahead. It can take several years to plan a conference. Some conferences have been in the planning stages for as long as five years.

To have a conference in your area, you need to complete a proposal and submit it to the SWU UW Board. When your proposal has been accepted and a year set, you will receive a detailed document that gives you all the basic suggestions you will need to know on how to put it on.

While we have suggestions and guidelines and a few musts, the Board hopes that your conference will reflect the flavor of your local area, interests and culture. The items that must be kept in mind in planning a conference are to address the overall purposes of SWU UW: education, social justice, women's spirituality, and leadership development.

SWU UW wants to help local women's groups to sponsor a conference and be successful. The Board will be as helpful to you as we know how. Do not hesitate to ask any questions that you may have.

### III. The Proposal

The very first step to take is to write or email the SWU UW Board to let them know you have an interest in having a conference. Then take as long as necessary to prepare your proposal. The final decision on acceptance of proposals will rest entirely with the full SWU UW Board.

The criteria the Board will use to determine the best site will be:  
Affordable hotel and facility costs

Ease of Transportation to site

Amenities and accessibility of the site

Full handicap accessibility

Geographic location in regard to previous conferences, ie: we have gone from Dallas, to Little Rock, to Austin, to Oklahoma City. We would not want to have two conferences in a row in close proximity.

Program concepts

Offerings good for new attendees and long time attendees

Willingness to work with SWU UW Board and within its guidelines

Programs and workshops that further the vision and mission statements of SWU UW, again; education, social justice, women's spirituality, and leadership development.

The proposal must include as much of the following information as possible. If an item has not been decided, such as the hotel, then submit your. Available information and your thinking in that area.

The proposal shall cover the following:

The names of the group(s) sponsoring the conference. The local sponsoring entity must either be a local Unitarian Universalist women's group, an affiliation of one or more local UU congregations or consist of any number of women who agree in spirit with the basic UU Principles and Purposes who are organized for acting as the convening sponsor.

Names, Addresses, Phone numbers, emails and church affiliation and church city of the Convener, Co-convener, Scholarship Chair, and Treasurer

Indicate the interest of your local group(s) to insure you would be able to develop a full committee.

A letter from your local UU church that they agree in general to be helpful, cooperative or supporting in your putting on a conference. Money should not be required from your church unless they want to donate to the planning. However, you wmay need to draw on their resources or building space.

The deposit, insurance or performance guarantee the hotel will ask for

Estimated hotel costs

Possible conference theme and possible theme speaker

It may be helpful to determine the theme speaker, then work the theme around that person. It is also possible that the SWU UW board may assist in arranging the keynote speaker since some keynotes must be booked years in advance.

Workshop ideas to the extent they are known

#### IV. PROCEDURES FOR PUTTING ON A CONFERENCE

The following information is meant to be a helpful guideline for you to use. Some items you will see must be done such as providing scholarships and financial matters. Feel free to improve, or whenever you can, to flavor your decisions with your group's own stamp.

Only the items preceded by \*\* are required items.

#### A. Preparing Your Brochure

In preparing brochures, be aware that color is very expensive to print in large amounts. On the other hand, the brochure is your invitation to attendees and is very important. Try to balance these two items. Consider having a nice cover, then reduce your costs for other pages. Instead of having a full color cover, consider only black, or one color ink other than black. One color is the lowest cost over black. Use of colored paper for the cover will heighten the overall appeal.

You should send at least three to each church. If you find you cannot afford to provide several full brochures to each church, at least send extra hotel and registration information sheets.

Each brochure must state the method of applying for a scholarship. Your committee can determine what types of scholarships you are able to provide. Request contributions to the scholarship fund in the brochure.

\*\*YOUR BROCHURE ITEMS NEED TO BE READY in time to appear in the fall/winter issue of the SWU UW newsletter, which usually is printed in September.

\*\*Early registration fees need to be set in a two-tier system. The lowest rate should exist for early registration usually October 1<sup>st</sup> through December 31<sup>st</sup>. Speakers, workshop presenters and workers need to be able to register at the lowest rate regardless of when they register.

\*\*Once your brochures are ready for mailing they need to be sent to the SWUUC (District) office for mailing using our bulk mailing permit.

\*\*The SWU UW website will carry your full brochure information as soon as it is developed. This will be accomplished with co-ordination with the SWU UW web master. This will allow some members to print out their own brochures and/or registration sheets.

#### V. FINANCIAL ISSUES

The conference conveners will make every effort to have conference income exceed conference costs. SWU UW will provide you with the budgets of recent conferences to serve as a guide in setting your own conference budget.

\*\*All financial matters – both income and expenses – will be handled through a branch bank that handles the SWU UW accounts. Details will be worked out with the conference treasurer and the SWU UW treasurer. Basically, the conveners will deposit all income into the SWU UW account and receive expenses reimbursements by check from the SWU UW treasurer in a timely matter.

No church or individual need make guarantees for SWU UW. Some start up expenses will need to be prepaid and reimbursed by SWU UW, such as brochure printing or committee expenses. Conference financial plans should include repaying SWU UW for any of these upfront costs.

**\*\*A letter of agreement between SWU UW and the convener and co-convener will be made outlining the handling of all monies.**

#### A. Profit Sharing

Profit should be kept in mind in all decisions. SWU UW is not able or willing to cover costs of the conference. They must be paid by registration fees. The conveners are the extended members of the organization's officers. There will be a fiduciary relationship between the convener and the organization. To avoid misunderstandings, the Conference Convener should confirm with all Conference team members that requests for reimbursement for items of out-of-pocket expense shall have been approved by the committee and will need to be accompanied by receipts when reported to SWU UW.

**\*\*Since all monies involved are provided by and are at risk by SWU UW, the organization will retain 85% of the profits and all of the membership monies. Dues will be deducted before the final accounting.**

**\*\*BUDGETS will be developed in the early planning process and forwarded to the SWU UW treasurer. The SWU UW Board will then make suggestions or changes and return an approved budget to the committee.**

#### VI. Hotel Arrangements

Letter of agreement with hotels: In coming to an agreement with the hotel, you will need to know the following:

- the number of meeting rooms,
- number of workshop rooms,
- meals (Saturday breakfast, lunch and banquet and Sunday continental breakfast),
- the number of hotel rooms they require reserved in order to get the main meeting room free,
- the amount SWU UW will be required to pay if the minimum is not met,
- the meeting space capacity,
- pre-conference and post-conference meeting rooms for 10 people for SWU UW board meetings,
- parking, and
- transportation to and from the airport.

SWU UW will help with negotiations to ensure conveners receive a reasonable cancellation policy from the hotel. SWU UW will purchase event cancellation insurance. This should eliminate the need for placing a deposit with the hotel. Should there be an event beyond your control such as extreme weather or other major negative event causing the conference to be cancelled, event insurance will cover the hotel costs.

Meals for Saturday breakfast, lunch and banquet, and Sunday's (possibly continental) breakfast need to be provided within the cost of registration.

The conference committee will have three months in which to make a \*\*Final Balance Statement, accounting for income/expenses to SWUW.

This statement will include a list of all income sources including the names of the registrants with their full information; an indication of which attendees paid dues, those who registered but later cancelled; those who came on scholarship; those that had their registration waived as presenters; those who had their registration waived as conference workers.

This statement will include a list of all expenses by category and the name paid to and for what purpose. Any expense paid out over \$900 will need a IRS Identification number.

If at the three month period, there are still outstanding items in the accounting process, itemize those at the end of the report with the expected date of finalization.

## VII. SCHOLARSHIP GUIDELINES

\*\*Scholarships need to be offered for a limited number of women.

One member of the convening committee should be designated to handle all issues of scholarship. Her name and contact should be provided in the brochure. SWUW encourages the conveners to fundraise for scholarship funds in advance of the conference. Other scholarship funds are to be provided through requesting donations through registration.

The scholarships are awarded on a "first come, first serve" basis. They may be for partial or full payment of registration fee as requested by applicants. This is to be stated in the brochure. Scholarship recipients may be required to do volunteer service at the conference.

Scholarship applications are to be made directly to the conference scholarship representative. Make a deadline for receipt of applications.

In the event that more funds are requested than are available, the person responsible for scholarships needs to provide that information to the SWUW board for their of the matter.

The representative will advise SWUW periodically of how many scholarships and amount have been awarded. The amount for the SWUW scholarships will be deducted before the final accounting.

## VIII. VENDORS

Soliciting of vendors at a very early stage will ensure a good number of booths being sold and that is a good way of working toward a profit. Be sure there is a great variety in the vendors selected. When vendors apply and you are selecting them, keep a waiting list of interested vendors you do not choose, in case some of the vendors cancel.

When soliciting vendors, be sure to ask the two previous vendor-coordinators if they have vendors they do not recommend.

Be sure to save spaces for local vendors (artists, potters etc.)

Determine an amount to charge per table. This is a good money maker.  
You may consider offering a local massage therapists a spot as a vendor.

Before the two conferences prior, prepare some type of vendor interest form they can fill out or take with them. Provide an email address on the form.

Vendors normally participate in contributing items for the raffle held after the business meeting.

SWU UW provides security for vendor merchandise during Friday and Saturday nights.

#### IX. MEMBERSHIP ITEMS

\*\*Collecting dues – all annual dues are payable yearly at the time of the Conference. Dues will be shown as an add on item in the Conference brochure for those who wish to pay that way. This is the main source of income for SWU UW. The SWU UW board sets the amount of dues through its annual budget process.

\*\*Non-members shall be asked to provide a registration fee in lieu of dues of \$10.00.

\*\*A list must be maintained by the committee of all persons who paid dues and submit it to the SWU UW Board. Immediately after the conference, the conference Treasurer will also submit the total amount of dues and non-member registration amounts.

\*\*Confirmations of Registration are required and may be done by email or U.S. mail.

Hotel registrations need to be monitored on a regular basis to determine if you are meeting your agreement with the hotel. They normally require a minimum number of hotel rooms rented in order to provide free space.

\*\*Nametag holders will be provided by SWU UW. You need only design self-peel labels \_\_\_\_x\_\_\_\_ and apply to the holder.

#### X. MARKETING YOUR CONFERENCE

You will need to advertise in the two issues of the newsletter prior to your conference (summer and winter). Other mentions can be included prior to those issues.

Mail brochures to all individuals who attended the prior conference.

Mail a number of brochures to churches' SWU UW contacts. The list of contacts will be provided. Request the church contacts to do Sunday and Women's group announcements, follow up on those who indicated interest and be a focal point for hotel and transportation arrangements. Also ask the contacts to suggest each attendee other non-UU women they can invite.

## XI. REGISTRATION

A head registrar will need to provide workers for registration, determine schedules to insure they are available when needed, and determine how it should be done and what needs to be done.

## XII. WELCOME COMMITTEE

Many conferences have had this committee to provide the ambiance of entering the conference. They may provide background music, set up and decorate the registration area, make any necessary signs so members know how to find the registration area, determine ice breaking games, and perhaps provide group activities in the common area.

## XIII. PROGRAM GUIDELINES

Spirituality

Theme Speaker

Maidens

Workshops should provide interest to both new and long time attending members.

There should be a balance of workshops covering each area of the SWU UW goals of education, social justice, spirituality and leadership. They may be lectures, group interaction, movement, worship, nature or other types.

SWU UW will put on a workshop at each conference. Allow a space in the first session. The workshop will cover "What SWU UW is, what they do, what social issues they are supporting, history of SWU UW and Conferences, "What is all this about goddesses?"

Opening Ceremonies need to be provided.

Closing Ceremonies need to be provided.

The Saturday banquet should have activities or entertainment.

Late night activities need to be provided.

## XIV. SCHEDULES TO KEEP IN MIND

Develop a working committee, determine your main theme speaker, determine your conference name and theme, and develop artwork for your logo. Also divide your committee into working sub-committees and give assignments.

Make an agreement with the hotel or site you will be using.

Advise SWU UW of all the conditions they are asking.

Nine months before the conference start soliciting vendors at the Conferences. Do it again the following year.

One year before your conference, prepare a skit or other method of advertising your conference at the business meeting on Saturday of the conference.

Have only two to four full committee meetings to talk about progress of assigned tasks.

Prepare an article for the newsletter of summer and winter issues prior to your conference.

#### XV. OTHER THINGS YOU NEED TO KNOW

SWUW's needs at a conference

Pre-conference meeting room needs to have space for around 10 people to meet on Friday around noon where lunch may be eaten.

Business meeting at lunch w/special event to keep members in lunch area

Please allow 30 minutes for the business meeting. Solicit items for a raffle or some other compelling event after the business meeting.

SWUW will put on a workshop at each conference. See Workshops

Post-conference meeting room same as pre-conference.

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