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## GENERAL STATEMENT

This is solely a guide for Big 10 Retirement Association (BTRA) members. Members consist of the retiree associations (to be referred to as “associations” throughout this document) of the Big 10 universities to assist in planning for the year they are hosting our annual conference.

The annual BTRA conference is the opportunity for member associations to showcase their campus and offers a forum to exchange information of mutual benefit with other member associations. The sharing may occur throughout the year, with the annual conference normally held sometime between June and August. As authorized by the BTRA bylaws, these events may be conducted physically face-to-face, in a password protected (or otherwise private) chat room, teleconference, videoconference, or other digital technology.

See **APPENDIX A** for responsibilities of all member associations.

It is suggested to start planning 24-30 months prior to hosting.

## HOSTING ASSOCIATION

Currently hosting association are on a 12-year rotation basis. See **APPENDIX B** for rotation schedule and **APPENDIX C** for responsibilities of the BTRA host associations.

An association will lose their place in the rotation schedule if their conference is cancelled for valid reason, i.e., national/local disaster, pandemic, etc. See **APPENDIX D – Definitions**.

Host associations may invite their retirement association members to attend as guests at their own expense.

## VOTING BODY

The voting body at BTRA meetings/conferences is limited to two delegates from each member association. No delegate shall have more than one vote, and no voting by proxy is allowed. Others may attend meetings/conference as non-voting observers.

## ANNUAL CONFERENCE

An invitation for next year’s conference from the upcoming hosting association is encouraged to be extended at the prior year’s conference business meeting.

It is suggested that schools present a power point featuring their campus and community. A school could use promotional materials from their chamber of commerce or institution along with specifics of conference dates and venue locations, and local attractions.

The invitation should be accepted by motion and vote during the annual business meeting.

## CONFERENCE CHAIR

The “Chair” is the designated representative of the host association and presides over all meetings and the conference. The term of office begins at the close of the previous conference and ends at the close of the hosted conference.

Conference chair serves as the “Chair” of the BTRA Administrative Board.

Duties may include:

- Supply information to member associations
- Arrange functions
- Prepare a budget
- Coordinate activities
- Gather a team to plan and organize the conference activities
- Arrange recreation, entertainment, and local tours
- Contact BTRA Administrative Board for a discussion of what went well at past conferences, what needs improvement, and any other suggestions for the upcoming conferences.

## CONFERENCE FINANCING

Each annual conference is self-supporting. The costs may come from a combination of the following sources:

- Registration fees from those attending
- Financial support of the host association and/or host institution
- Financial support of campus partners, and public sponsors deemed appropriate by the host association

It is suggested that each association create a restricted reserve fund and set a fixed amount into their reserve each year between hosting years. This annual funding will ease the burden to an association when it's their turn to host.

See BTRA website ([BigTen Retirees Directory \(umich.edu\)](https://umich.edu/bigten-retirees-directory)) and **APPENDIX L** – Conference Budget Samples and Observations.

## HANDBOOK REVISIONS

Changes to this handbook may be proposed by the Administrative Board members, or any member association delegate. Proposed changes should be sent to the Administrative Board Chair. After review by the Administrative Board, the Chair will forward to the Bylaw and Handbook Committee for review, to ensure compliance with bylaws, make revisions and distribute to member associations.

## APPENDIX A - Rotation Schedule

<b>2022</b>	Northwestern University	<b>2028</b>	University of Nebraska
<b>2023</b>	University of Wisconsin-Madison	<b>2029</b>	Purdue University
<b>2024</b>	The Ohio State University	<b>2030</b>	Pennsylvania State University
<b>2025</b>	University of Michigan	<b>2031</b>	University of Illinois
<b>2026</b>	University of Minnesota	<b>2032</b>	University of Iowa
<b>2027</b>	Michigan State University	<b>2033</b>	Indiana University

***NOTE: Changes in rotation require a vote of member associations.***

## APPENDIX B - Responsibilities of all Member Associations

- Appoint delegates/alternates for conference/meeting voting representation (Each association is allowed two votes)
- Actively participate in BTRA events and activities
- Respond to requests for information from other member associations. All member associations may request information from other members.
- Annually provide BTRA webmaster with names and contact information of the current primary association contact, association president, conference delegates, and newsletter exchange person
- Host an annual conference/meeting in accordance with the agreed upon association rotation. Annual conferences are normally held sometime between June and August (see **APPENDIX A**)
- Suggest setting aside funds annually in a restricted fund for hosting the BTRA annual conference

## APPENDIX C - Responsibilities of BTRA host association

- If a branch campus of any Big 10 University which has a retiree association submits an application/petition for membership it is the responsibility of the host association to follow the vetting process detailed in the BTRA bylaws.

- Remind the upcoming host association to prepare an invitation to their conference the following year. This should be done at the prior conference as outlined in section titled “Annual Conference”.
- An association will lose their place in the rotation schedule (**APPENDIX A**) if their conference is cancelled for valid reason (**APPENDIX D**).

## APPENDIX D – Reasons for Conference Cancellations

It is suggested a detailed discussion take place with the Administrative Board before any cancellation.

Reasons for a conference cancellation may include natural or local catastrophe, i.e., flooding, hurricane, tornado, fire, etc. Public health emergency, i.e., pandemic.

## APPENDIX E – Suggested Timeline and Required Documents

Below is a suggested planning timeline and checklist to assist in designing and organizing your event. Some of these items are required while others may not be needed for your event.

**APPENDIX I** – Conference Timeline Checklist may be helpful in keeping track of tasks.

### Required Documents for distribution at each annual conference

- BTRA Comparison Spreadsheet
- Full Conference Agenda and Business Meeting Agenda
- List of Attendees
- Conference Evaluation Form
- Business meeting minutes of previous annual conference

It is suggested to start planning 24-30 months prior to hosting.

### 24-30 Months Ahead of Event

- ☐ Start planning.
- ☐ Identify your planning team
- ☐ Recruit an event committee. This includes selecting an event manager or chair and establishing sub-committee chairs. See **APPENDIX H** for a suggested list of committees.

### 18-24 Months Ahead of Event

- ☐ Prepare PowerPoint presentation for promotion of hosted conference
- ☐ Establish your event goals and objectives.
- ☐ Select the date.
- ☐ Identify venue and negotiate details. Be mindful of accessibility needs of attendees.

- ☐ Identify potential community or university event conflicts, e.g., Ironman, summer graduation
- ☐ Develop an event master plan.
- ☐ Get cost estimates. Some costs you might need to consider are:
  - Room rental
  - Food and beverages
  - Equipment
  - Speaker fees
  - Travel for staff
  - Insurance
  - Bus transportation for tours and off-site events
- ☐ Create an event budget. (See **APPENDIX L** – Conference Budget Sample & Observations)
- ☐ Recruit an event committee. This includes selecting an event manager or chair and establishing sub-committee chairs. See **APPENDIX H** for a suggested list of committees.
- ☐ Brand your event.
  - Start building out an event website or pages on your website that describe the event.
  - Develop an event logo and tagline.
- ☐ Create and launch publicity plan. This includes ensuring staff and/or volunteers are identified to manage specific tasks – e.g., media relations, VIP coordination, printed material design & printing coordination, signage, online /social media, etc.
- ☐ Notify campus administration of the upcoming BTRA conference. Hosting associations may wish to extend an invitation to campus leadership to bring greetings and potentially speaking sometime during the conference.
- ☐ Identify and confirm speakers/presenters/entertainers.
- ☐ Identify and contact sponsors/partners.
- ☐ Determine if you need event registration software to make the process easier.
- ☐ Determine if you need other event management software.
- ☐ Release early-bird tickets.
  - Ensure registration forms are accessible and allow space for preferred pronouns and preferred names.

## 10-17 Months Ahead of Event

- ☐ **Build out required documents for your team.**
- ☐ **Speaker/presenter/entertainer liaison:**
  - Finalize presentation/speech topics
  - Get bio information, photo
  - Travel & accommodation arrangements
  - Have contracts signed if appropriate
  - Ask speakers to start promoting and sharing it with their network
- ☐ **Financial/Administration:**

- Determine registration fees
  - Set up and enable online registration
  - Finalize sponsor levels and amounts
  - Identify items to be underwritten and accounting tracking details
  - Final count attending from each association (representatives and guest)
  - Send request for an estimated head-count to each of the member associations
- ☐ **Venue and logistics planning:**
- Determine and arrange all details re menu, A/V equipment, registration set-up, parking, signage, etc.
  - Review security needs/plan for the event with venue manager
  - Investigate need for any special permits, licenses, insurance, etc.
  - Assess accessibility requirements (e.g., all-gender restrooms, wheelchair accessibility, etc.)
  - Communicate accessibility requirements to staff.
- ☐ **Follow publicity plan:**
- Develop draft program
  - Create draft event script (e.g., MC, speaker introductions, thanks, closing, etc.)
  - Develop publicity pieces -- e.g., newsletter articles and/or ads, radio spots, print blog posts articles for submission to other publications and/or ads, etc.
  - Request logos from corporate sponsors for online and printed materials
  - Develop and produce invitations, programs, posters, tickets, etc.
  - Develop media list & prepare News Release, Media Advisory, Backgrounder and all media kit materials (e.g., speaker info, photos, etc.)
  - Create event page on your website
  - Enable/create email event notifications
  - Create a Facebook event page
  - Develop a promo video and post on YouTube and your Facebook page
  - Register your event on a variety of online event calendars
  - Create some buzz on your blog or member forums
  - Determine VIPs and create invitation & tracking document (e.g., spreadsheet)
  - Order any desired event swag

### 3-9 Months Ahead of Event

- ☐ **Develop the annual business meeting agenda.** The hosting association is encouraged to schedule the business meeting during the first full day of the conference so as not to interfere with late arrivals and early departures. See **APPENDIX N** – BTRA Annual Business Meeting Agenda sample.
- ☐ **Send out the “BTRA Comparison Spreadsheet”** to associations for updates or other requested information. Prepare finalized document for distribution at the annual business meeting.
- Develop a conference evaluation.** See **APPENDIX P** – Post Conference Evaluation sample.



- ☐ **Send reminders to your contact list regarding registration and participation.** Finalize headcount from each of the member associations (meetings, meals, lodging)
- ☐ **Reach out again to presenters/speakers regarding:**
  - Confirming travel and accommodation details
  - Request copy of speeches and/or presentations
- ☐ **Sponsorship finalization:**
  - Follow up to confirm sponsorships and underwriting
  - Get any promotional materials you'll be sharing at the event
  - Ask sponsors to share event on their promotional channels
- ☐ **Continue executing on your publicity plan:**
  - Release press announcements about keynote speakers, celebrities, VIPs attending, honorees, etc.
  - Post your initial event news release on your website and circulate to all partners, affiliated organizations, etc.
  - Post more details about your event on social media
- ☐ **Close early-bird registration, if any.**
- ☐ **Finalize and proofread printed materials.**
- ☐ **Arrange for late hotel checkout for attendees**
- ☐ **Prepare attendee list.** List should include: attendee names, address, email, home/office/ mobile numbers, name of the association, and an emergency contact.
  - Distribute list to attendees prior to the conference
  - Include list in meeting materials

## 1 Week Ahead of Event

- ☐ **Have all committee chairs meet and confirm all details against Master Plan.**
  - You should also ensure back-up plans are developed for any situation (e.g., back-up volunteers as VIP greeters, additional volunteers for registration or set-up, etc.)
- ☐ **Finalize event script.**
  - Assign practice sessions for anyone who has a speaking slot.
- ☐ **Brief any/all hosts, greeters, volunteers about their event duties and timelines.**
- ☐ **Finalize your seating plan.**
  - Ensure it includes wheelchair-accessible areas and has clear paths through the venue.
- ☐ **Provide final registration numbers to caterer** (may be earlier deadline based on venue). This may include special dietary needs.
- ☐ **Make print and online copies of any speeches, videos, and presentations.**
- ☐ **Do a final registration check, including name badges & registration list.**
  - Depending on when your registration closes, this may not be possible until a few days in advance but try to finish it as early as possible.
- ☐ **Determine photo op and interview opportunities with any presenters and VIPs.**
- ☐ **Confirm details with media attendees.**

## 1 Day Before the Event

- ☐ **Confirm media attendance.**
- ☐ **Ensure all signage is in place — both around the venue and any other areas in which it's needed.**
- ☐ **Ensure registration and media tables are prepared** and stocked with necessary items (such as blank name badges, paper, pens, tape, stapler, etc.)
  - Ensure there are enough outlets. If not, consider bringing power bars for attendees and your team.
- ☐ **Ensure all promo items, gifts, plaques, trophies, etc. are on-site.**
- ☐ **Ensure all A/V equipment is set up and working properly.**
- ☐ **Get a good night's sleep! You'll need the rest before the exciting day to come.**

## Event Day

- ☐ **Take a few deep breaths — you got this!**
- ☐ **Ensure you have copies of all instructions**, directions, phone numbers, keys, extra parking permits for VIP guests, seating charts and guest lists with you
- ☐ **Check in with each Committee Chair to ensure their team is on track.**
  - Also check in with catering and any sponsor teams that are attending.
- ☐ **Assist sponsors, speakers, and other teams as needed.**
- ☐ **Greet new attendees.**

## Post Event Follow-Up

While you need to conduct a thorough evaluation and update your budget, there are post event publicity, fundraising and member development opportunities that you can take advantage of with just a little pre-event planning. Here are some of the activities you might consider once the event is over:

- ☐ **Check in with venue.** Ensure nothing important was left behind.
- ☐ **Financial status:**
  - Gather all receipts and documentation, final registration data, etc.
  - Update budget
- ☐ **Send thank-you's and acknowledgement letters to:**
  - Sponsors
  - Volunteers
  - Speakers/presenters
  - Donors
  - Venues
  - The media

In your thank-you notes, be sure to remind the recipients of the event's success – and how they contributed (e.g., dollars raised, awareness - number of participants, etc.

- ☐ **Post-event publicity:**
  - Send out an email to your subscriber base with highlights from the event
  - Make a publicity reel video to share how it went (and as a bonus, you can use it as publicity next year!)
  - Share highlights on social media
  - Update website page to reflect that it's a past event.
- ☐ **Conduct a post-event survey.** Learn what people enjoyed about your event and where you have room to improve.
- ☐ **Reach out to event participants.** Thank them for participating and promote your ongoing programs and how they can support you throughout the year by joining, volunteering, or making a sustaining donation.
- ☐ **Conduct a team debrief to learn their thoughts.**
- ☐ **Conduct a thorough evaluation of the event.** What went well and what could you do better next time?
- ☐ **Schedule a meeting with BTRA Administrative Board for a post-event review and suggestions to this handbook.**

## APPENDIX F – Suggested Tasks/Responsibilities for Coordinator

Below is a suggested tasks associated with your event. Some of these items may not be needed for your event, while there may be other tasks that need to be added. See **APPENDIX G - Previous Conference Observations and Suggestions for Hosting Association** for sample seating layout.

### LOCATION / VENUE

1. Establish your needs (number of attendees, space requirements, date)
2. Do a venue search (sites, weather, social activities, accommodation. Identify potential community or university event conflicts, i.e., Ironman, summer graduation)
3. Identify several facilities equipped to meet your requirements
4. Prepare a Request for Proposal (RFP)
5. Send out RFP's
6. Visit sites (if possible)
7. Decide on a venue
8. Sign a contract with the chosen venue
9. Inform all venues to which you sent out an RFP of your decision

### REGISTRATION

1. Determine early-bird and final registration dates
2. Decide on a registration procedure (e.g. online, paper-based – or both )
3. Choose an online registration system
4. Determine the price for the conference

5. Determine which payment options you will accept (e.g., check, Visa, Mastercard)
6. Set up a merchant account for credit card payments
7. Decide on a cancellation policy
8. Create the registration form, including additional items such as:
  - a. Meals and dietary requirements
  - b. Accommodation – be mindful of accessibility issues of attendees.
  - c. Transportation
  - d. Sessions and workshops
  - e. The social program
  - f. Spousal packages
9. Publish your registration form (online and/or on paper)
10. Determine your onsite registration procedure and recruit/hire additional staff if necessary
11. Send confirmation of registration to delegates upon receipt of payment
12. Create conference packages
13. Meet your staff or volunteers onsite and get ready to greet attendees

## SPEAKERS AND PRESENTERS

1. Research and select speakers
2. Sign and collect contracts with all speakers
3. Create and send out a conference information package to all speakers containing
  - a. Committee point of contact
  - b. Review of conference goals
  - c. Audience demographics
  - d. Presentation handout procedures
  - e. Hotel and transportation information
  - f. Finalized agenda
  - g. Compensation information
4. Arrange for speaker support (one point of contact to have their needs met)
5. Arrange for speaker audio/visual and other requirements
6. Collect speaker biographies for their introduction
7. Arrange for speaker accommodation and transportation and confirm arrival times
8. Arrange for speaker compensation

## SPONSORS, EXHIBITORS, PARTNERS

1. Create a list of potential sponsors
2. Prepare a sponsor package outlining the benefits of sponsorship
3. Sign and collect contracts from exhibitors and sponsors
4. Create and send out an information package for exhibitors containing
  - a. Committee point of contact
  - b. Review of conference goals
  - c. Procedural instructions
  - d. Finalized agenda
  - e. Floor space allocation
5. Map out floor space for exhibitors

6. Find out exhibitor requirements and order booths etc

## MARKETING AND PUBLIC RELATIONS

1. Develop a promotional website
2. Create and send out press releases and mass mailers
3. Gather location promotional material (from chamber of commerce or tourism agency)
4. Approach transportation and accommodation facilities to negotiate special conference rates
5. Convey the message that the conference organizers will go out of their way to provide a positive experience to all participants
6. Provide an opportunity for the media to participate in getting the message out e.g., offering interviews with keynote speakers, negotiating for the production of a radio or television show

## EVENT WEBSITE CHECKLIST

1. Meeting title, dates, venue and contact details (on the opening page)
2. The agenda and information on speakers
3. Registration information and an online registration form
4. Who should attend and the benefits of attending the event
5. The meeting's goals and objectives
6. Sponsor and Exhibitor information
7. Accommodation information
8. Local information (maps, city information, local restaurants etc.)
9. Travel information

## PRINTED MATERIALS

Identify signage and other printed materials requirements

Determine whether printed materials can be designed in-house or must be outsourced

Create brochures

Create marketing and conference identification materials

Create registration packages

Send out an RFP to several printing companies

Sign contract with printing company

## AUDIO-VISUAL REQUIREMENTS

1. Ascertain the audio-visual requirements for each segment of the conference (presentations, reception, breakouts etc.)
2. Contact speakers to find out about any special needs or requirements
3. Contact the venue to establish whether or not audio-visual requirements can be provided for in-house by the venue. Ask whether or not it is possible to outsource audio-visual
4. Contact audio-visual company to get a quote for outsourcing your audio-visual requirements
5. Sign a contract with audio-visual company
6. Arrange for an audio-visual technician to be onsite for troubleshooting

7. Assign a conference worker to verify that audio-visual is functioning properly before each session
8. Establish security measures for audio-visual equipment

## ACCOMMODATIONS

1. Establish what accommodation is available around the conference site
2. Negotiate room rates for participants with hotels and/or other accommodation providers including early arrivals and extended stays (at conference rate)
3. Sign a contract with hotels for provision of accommodation
4. Establish booking/registration procedures
5. Establish accommodation booking deadline
6. Convey accommodation information and booking deadlines to participants
7. Confirm room bookings with hotels

## TRANSPORTATION

1. Contact a local transportation provider to transfer your delegates between events and venues as well as airports and other providers as soon as you have chosen your host city
2. Contact the local Visitor and Convention Bureau or Conference Centre for authorized carriers in the local area
3. Negotiate deals with transportation companies for discounts for participants Be sure to get copies of licensing, insurance and any permits they will need to provide you with the services you require.
4. Convey transportation information to participants

## FOOD AND BEVERAGE

1. Identify your expected food and beverage needs (how many attendees for how many meals and breaks)
2. Find out what the conference facility has to offer and whether they allow outside catering
3. Get menu options from caterers
4. Decide who you will be catering your conference
5. Book the caterer
6. Sign contract with caterer
7. Implement a strategy for identifying and accommodating dietary restrictions
8. Send final food and beverage requirements to the caterer

## SOCIAL EVENTS

1. Contact the local Visitor and Convention Bureau or Conference Centre for suggestions for social events and trips
2. Research local tour operators. Most tour operators are happy to customize your tour to your needs
3. Visit venues and attractions and request tours from locals who are 'in the know'
4. Identify all social events to be offered by the conference, including spousal programs
5. Determine which events will require registration
6. Implement a registration procedure for social events

## APPENDIX G – Previous Conference Observations and Suggestions for Hosting Association

- More time for sharing --- at least double time 8:30-10
- Use a timer when sharing so all associations have equal opportunity to share
- U-shape table –(open-square) with lots of elbowroom
  - Open U table worked well for speakers. Suggest that instead of square corners ... put corner on angle. (sort of “octagon shape – but without the bottom 3 sides). That way if you are sitting on a side, you can see who is on the “corner”. DEFINITELY add more space between chairs around the square
- Table tents –
  - Arrange 2 sets of table tents .... For voting purposes during the business meeting, it is suggested to have one large table tent with school name placed in front of a number of chairs for that association’s voting delegates. (If possible, seat non-voting delegates apart from the voting delegates.)
  - Then table tents for each attendee – printed on both sides – print as large as possible.
  - Have host school layout seating since they have the number attending from each school.
- Table for material sharing
  - Ask Associations to provide: Copies of operating manuals; and List of activities
- Promote upcoming conference
- Ask speakers/presenters for copies of handouts / PPTs
- List of attendees with addresses, email, phone numbers should be sent to attendees prior to the conference. May also be included in the meeting materials.
- Flip chart markers
- Flip chart for Parked Items. Encourage attendees to add to the list when something is thought of.
- Identify someone to serve as Scribe/Recorder (for parked items and meeting proceedings/discussion)
- Arrange for late hotel checkout for attendees.
- Negotiate with hotel to allow for extended stays (before or after) at conference rate.
- Name tags (clip, magnetic, lanyard preferred)
- Additional chairs
- Start opening session with introductions. While potentially some repeat attendees, there will be new folks in attendance. Waiting for the introductions, until they had a comment to add to the conversation, doesn’t work well.
- Set ‘ground rules’ for discussions, e.g.,

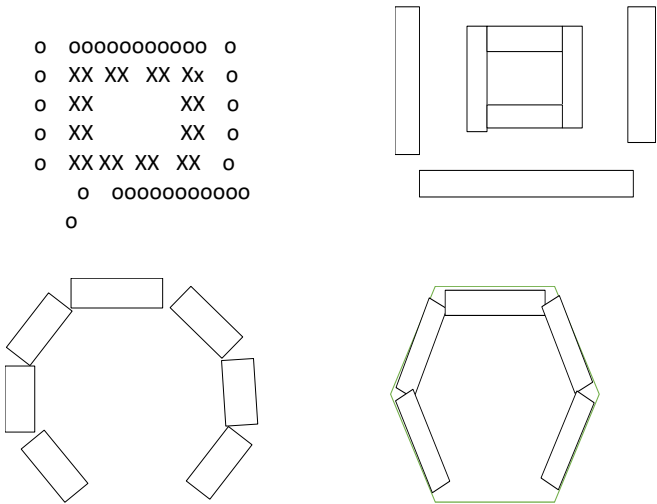
- Raise name tent on end to be recognized
- Give every school equal opportunity to share before a school is recognized a second time on the same topic
- As part of ground rules — offer invite attendees to feel free to get up at any time for stretch or standing.
- Pre-Conference Questionnaire
  - BTRA members often have questions they would like to ask or topics they'd like to discuss at our conference, but many times we run out of time.
  - It is suggested that the host association survey the BTRA members for questions or topics they would like to ask of other members (e.g., what are your dues, how many members do you have, how much financial support do you get from the school administration, do you have a formal onboarding process for new members and what does it look like, etc.).

Suggested process and timeline	
• Solicit questions from associations	10-12 weeks
• Receive responses from associations, and • Compile a survey document	7-9 weeks
• Send survey document to associations	5-6 weeks
• Receive survey document responses, and • Compile responses and comparisons	4 weeks
• Forward responses and comparisons to attendees • May consider including copy in conference meeting materials)	2 weeks

- This saves a lot of time at the conference going around the room answering member questions. Members can still ask questions about the answers at the conference.
- Conference room setup to promote discussion -- with lots of elbow-room
  - Open U table worked well for speakers. Suggest that instead of square corners ... put corner on angle. (sort of “octagon shape – but without the bottom side). That way if you are sitting on a side, you can see who is on the “corner”. DEFINITELY add more space between chairs around the square
  - May want to consider a bit of a change to the room layouts .... Since bylaws state that each association is allowed 2 ‘voting’ delegates .... Maybe do 2 squares ....one inside the other .... Something like diagram below ... where the inside are 2 representatives, and the outside are the other attendees from each school. There are some



disadvantages to this setup .... And maybe microphones might be needed. Additionally, it might “feel” not everyone in attendance is “equal” and all opinions welcome or valued. I’m sure that they are more options or different room set-ups that could be used.



## APPENDIX H – Establishing a Committee – Sample Form

Responsibility	Committee Member	Phone	Email
Venue			
Accommodation			
Conference Program			
Speakers/Presenters			
Exhibits			
Registration			
Abstracts			
Marketing			
Printed Materials			
Audio/Visual			
Supplies			
Transportation			
Food			
Campus Tours & Other Events			
Sponsorship			

## APPENDIX I – Conference Timeline Checklist – Sample Form

CONFERENCE TIMELINE				
our conference	area of responsibility	person responsible	deadline	signoff
Set up registration desk				
Ship materials to site				
AV requirements due				
Final deadline for meal orders				
Final deadline for accommodations				
Send program to attendees				
Publish program on website				
Final registration deadline				
Send program to the printers				
Reserve transport for speakers				
Reserve hotel for speakers				
Send room specs to venue				
Order 'goodie' bags/giveaways				
Early registration deadline				
Send out meeting invitations				
Registration Open				
Launch conference website				
Venue selection				
Site visits				
Finalize budget				
Determine goals and objectives				

## APPENDIX J – Task Assignment – Sample Form

### Registration

Person Responsible:

#### ***Important Dates***

Open Conference for registration:

Early bird deadline: \_\_\_\_\_ Final Deadline:

### ***Tasks***

1. Determine early-bird and final registration dates
2. Decide on a registration procedure (e.g. online, paper-based – or both )
3. Choose an online registration system
4. Determine the price for the conference
5. Determine which payment options you will accept (e.g. check, Visa, Mastercard)
6. Set up a merchant account for credit card payments
7. Decide on a cancellation policy
8. Create the registration form, including additional items such as:
  - a. Meals and dietary requirements, food allergies
  - b. Accommodation
  - c. Transportation
  - d. Sessions and workshops
  - e. The social program
  - f. Spousal packages
9. Publish your registration form (online and/or on paper)
10. Determine your onsite registration procedure and hire additional staff if necessary
11. Send confirmation of registration to delegates upon receipt of payment
12. Create conference packages
13. Meet your staff or volunteers onsite and get ready to greet attendees

## APPENDIX K – Registration – Sample Form

Registration materials – include a map and directions to venue/hotel

### REGISTRATION FORM

**Big Ten Retirees Association Annual Meeting on \_\_\_\_\_**  
**Registration deadline date \_\_\_\_\_**

Payment in full, by check, credit card, or money order, must accompany this form. This form may be duplicated for additional registrations. Please print in ink or type. Registration confirmation will be sent to the email address that you provide. Include all information requested and return the completed form to \_\_\_\_\_ by \_\_\_\_\_. You may register and pay online at \_\_\_\_\_

#### PLEASE PRINT

Last name \_\_\_\_\_ First name \_\_\_\_\_ Middle initial \_\_\_\_\_

Email address \_\_\_\_\_

*Your email will be used to communicate confirmation and logistical information regarding the meeting.*

Institution, company or organization \_\_\_\_\_

Position/role \_\_\_\_\_

Please check one: ☐ Work address ☐ Home address

Mailing address (no. and street, or box no.) \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_

ZIP code \_\_\_\_\_ Country \_\_\_\_\_

Phone number \_\_\_\_\_ Mobile number \_\_\_\_\_

Enter your name as you would like it to appear on your name badge

First name \_\_\_\_\_ Last name \_\_\_\_\_

Special Dietary needs/accommodations (if none, leave blank) \_\_\_\_\_

I am attending as the ☐ Institution Voting Delegate ☐ Institution Alternate ☐ Institution Observer

#### Registration Fee

☐ \$175 Official Delegate by July 3

☐ \$125 Non-official Delegate by July 3

☐ \$200 Official Delegate after July 3

☐ \$150 Non-official Delegate after July 3

#### Confirmation

You will receive confirmation by email; if you do not provide an email address, you will receive confirmation by postal mail.

#### Substitutions

Anyone who is registered but cannot attend may identify a substitute. A full refund will be issued after the substitution registration has been completed. A registration form and full payment by the substitute are required. Substitutes are eligible to register at the same fee.

#### Payment

Your payment, in full, must accompany your registration form.

Enclosed is a check or money order for the amount indicated, signed and payable to The Pennsylvania State University.

☐ Enclosed is a purchase order (made payable to \_\_\_\_\_)

☐ Personal credit card

☐ Business credit card

☐ Credit card: May be mailed or faxed. ☐ American Express ☐ MasterCard ☐ Visa ☐ Discover

Cardholder's name (please print) \_\_\_\_\_

Cardholder's signature \_\_\_\_\_

Cardholder's phone number \_\_\_\_\_

Credit card billing address (no. and street, or box no.) \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Credit card number \_\_\_\_\_ Exp. date (month/year) \_\_\_\_\_

(Credit card charges cannot be processed without signature and expiration date.)

#### Send All Registration Pages to:

Include address

## APPENDIX L – Conference Budget Samples and Observations

### Summary of Revenue & Expenses 2019 Big Ten Retiree Association Annual Meeting Hosted by University of Illinois at Urbana-Champaign (UIUC)

#### Direct Costs

I-Hotel/Conference Center Meeting Room Charges.....	\$2,295.00
I-Hotel/Conference Center Catering Charges.....	\$3,619.62
• Friday Afternoon	(\$198.16)
• Friday Reception/Dinner	(\$1,796.87)
• Saturday Morning	(\$180.2)
• Saturday Mid-Morning	(\$104.37)
• Saturday Lunch	(\$665.45)
• Sunday Morning	(\$140.28)
• Sunday Mid-Morning	(104.37)
• Sunday Lunch	(\$429.84)
President's House Reception.....	\$1,750.00
Saturday Evening Dinner.....	\$2,324.87
• Classic Events Catering	(\$1,547.50)
• Alumni Center Charge	(\$777.37)
Conference/Event Services*.....	\$4,377.59
Bus Tour/Transportation.....	\$766.00
Event Liability Insurance.....	\$165.00
"Goody Bag"—Pens, Folders, Notebooks.....	\$250.47
<b>Total Direct Costs</b>	<b>\$15,548.55</b>

#### Revenue Available

Conference Registrations.....	\$5,475.00
• Regular Attendees	(\$4,725.00)
• Guests	(\$750.00)
President's Office.....	\$1,750.00
Balance from SUAA-UIUC Treasury.....	\$8,323.55
<b>Total Revenue</b>	<b>\$15,548.55</b>

\*Includes all registration services and post-conference evaluation.

## **UIUC Summary**

Total expenses for the Conference were \$15,548.55.

These were offset by revenue from three sources. Conference registrations for both attendees and guests totaled \$5,475.00 from 27 attendees and 6 guests. The University of Illinois President's Office covered the cost of the Saturday afternoon reception at the President's House. And the general operating budget of SUAA-UIUC (our local chapter of the statewide Annuitant's Association) provided the balance of \$8,323.55.

In addition to the direct costs assigned to our chapter budget itemized in the attachment, the chapter covered registration costs for six SUAA-UIUC attendees, and the total commitment of support from the President's Office was \$3,000.00.

## **Observations**

First, while this may sound odd coming from a former CFO, I will tell you that for most of our planning decisions, cost was not a dominant factor. For example, we knew from the outset that we wanted the conference venue to be the I-Hotel and Conference Center. That decision was based on convenience to and accommodation of the participants, and on our multiple successful meetings held at the Conference Center. Could we have found a less expensive option? Probably -- but not one we would have preferred. Similarly, we could have held dinner on both Friday and Saturday evening at the Conference and reduced meal costs a bit. But we preferred to use the Alumni Center and another caterer for variety.

Second, we also knew from the outset that our chapter was not well-equipped to handle the registration process and particularly the use of credit cards for payment -- clearly the standard expected from virtually all registrants. So we contracted for registration services from the University Office of Conference and Event Services. In addition to all registration activities, including production of name tags and staffing the registration table on Friday afternoon, the Office arranged for the bus tour and implemented the post-conference evaluation. To the extent that your organizations can provide these services through staff or volunteers, this is one area where a substantial cost reduction in our expenses could be achieved.

Third, we decided quite early that we would not seek an increase in the conference registration fee. This was due largely to the planning committee's sense that our chapter budget was adequate to absorb whatever costs were incurred above the registration fee revenue and President's Office contribution. In retrospect, and particularly in light of the discussion of the conference fee at our business meeting, I wish we had been more sensitive to the issue of using modest annual increases over time instead of a large increase when unavoidable.

Fourth, as you will see from the table, we did not pay honoraria (honorariums?) to our speakers nor to our performers. We discussed the need to do so if asked, but the issue was not raised.

Fifth and finally, if I were doing this over, I would start early enough to get contributions from appropriate local organizations to cover costs for things like the "goody bag," printing and publicity costs and perhaps the Friday evening reception. We could have done that but did not, and that is one improvement our internal evaluation will cite. We did get help from the local convention and visitors bureau thanks to Bill Williamson's persistence.

I hope this information is useful in some way. Please let me know what more might help.

Steve Rugg (steverugg66@aol.com)

# Summary of Revenue & Expenses

## 2018 Big Ten Retiree Association Annual Meeting

### Hosted by Penn State

INCOME	Number	Unit cost		Total
<b>Registration</b>				
Delegates @ \$175 ea	22	\$ 175.00	\$ 3,850.00	
Non-delegates @ \$125 ea	9	\$ 125.00	\$ 1,125.00	\$ 4,975.00
<b>Grants/Donations</b>				
Penn State - Provost's office			\$ 2,500.00	\$ 2,500.00
<b>Individual meals</b>				
Friday	20	\$ 50.00	\$ 1,000.00	
Saturday	0	\$ 50.00	\$ -	\$ 1,000.00
<b>Total Income</b>			\$ 8,475.00	<b>\$ 8,475.00</b>
<b>EXPENDITURES</b>				
<b>Registration</b>				
Conferences & Institutes Set-up			\$ 800.00	
Per registration	23	\$ 25.00	\$ 575.00	
Name badges			\$ 17.95	
Folios	25	\$ 0.95	\$ 23.75	
Credit card fees	23	\$ 4.40	\$ 101.20	\$ 1,517.90
<b>Goodie Bags</b>				
Brief cases (Delegates only)	25		\$ 530.31	
Rick Alley book (Delegates only)	23	\$ 22.36	\$ 514.28	\$ 1,044.59
<b>Thank You's</b>				
Guest speakers Gift cards	2	\$ 50.00	\$ 100.00	\$ 100.00
<b>Meals</b>				
Friday dinner	55	\$ 50.00	\$ 2,750.00	
Saturday breakfast	31	\$ 22.00	\$ 682.00	
Saturday lunch	31	\$ 25.00	\$ 775.00	
Sat. Dinner Harrison's - catered meal	42	\$ 50.00	\$ 2,100.00	
Sat. Dinner Mt. Nittany Winery - wine			\$ 225.00	
Sunday breakfast	31	\$ 22.00	\$ 682.00	
Sunday box lunch	31	\$ 18.00	\$ 558.00	\$ 7,772.00
<b>Mixers</b>				
Friday pre-dinner	55	\$ 9.50	\$ 522.50	
Friday Wine chit	55	\$ 8.00	\$ 440.00	
Friday bartender	1	\$ 75.00	\$ 75.00	
Saturday Winetasting etc.	40	\$ 10.95	\$ 438.00	
Saturday Munchies, supplies, etc		\$ 150.00	\$ 150.00	\$ 1,625.50
<b>Breaks</b>				
Saturday a.m.			\$ 100.00	
Sunday a.m.			\$ 100.00	\$ 200.00
<b>Transportation</b>				
Saturday tour & dinner	1	\$ 725.00	\$ 725.00	\$ 725.00
<b>Handouts</b>				
Paper/copying costs/handouts			\$ 300.00	\$ 300.00
<b>Total Expenditures</b>			<b>\$ 13,284.99</b>	<b>\$ 13,284.99</b>
<b>Support requested</b>			\$ 4,809.99	\$ (4,809.99)
<b>Possible eliminations:</b>				
Fri. social wine chit	\$440.00			
Fri bartender (depends on sales)	\$75.00			
Rick Allee book	\$514.28			
Sunday box lunches - locals (7)	\$126.00			
<b>TOTAL</b>	<b>\$1,155.28</b>	<b>Revised need</b>	<b>\$ (3,654.71)</b>	



## Penn State Observations

Attached is the working budget that we developed. I do not have a 'final report' in my files, but as I recall, the Club (at that time; we are now called the Penn State University Retirees Association) ended up contributing approximately \$4,000 toward costs. We did eliminate the Friday wine social chit and the Rick Allee book; I am not sure about the Sunday box lunches for locals.

- The Provost's Office provided \$2,500 in support
- We used Conferences and Institutes to handle credit card registrations. Unfortunately, their fees were much higher than expected. Non-registered participants were encouraged to send their registrations with checks rather than using credit cards.
- You will learn that most other Universities provided more financial support to their Associations.

I don't think I can find a lot more in terms of details, but if you have any questions, I will do my best to respond.

E. Alan Cameron (eajabaka@gmail.com)

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### Summary of Revenue and Expenses 2022 Big Ten Retirement Association Annual Meeting Hosted by Northwestern University August 1-3, 2022

	<b>Actual</b>	<b>Estimated</b>
Event Space.....	\$1390.00	\$1390.00
AV.....	408.00	1240.00
Food and Beverage.....	11,955.50	15,000.00
Entertainment.....	375.00	400.00
Welcome Bag.....	1,006.50	600.00
Transportation/Parking.....	4,012.00	4,500.00
Signage.....	00.00	300.00
<b>Total Cost</b>	<b>\$19,147.00</b>	<b>\$23,430.00</b>
<b>Revenue</b> .....	5,275.00	10,000.00
<b>Net Cost</b> .....	<b>\$13,872.00</b>	<b>\$13,430.00</b>

Submitted by Al Telsar, 2022 Conference Chair

## APPENDIX M – Conference Agenda Sample

### Big Ten Retirees Association Annual Conference Nittany Lion Inn, Penn State University, University Park, Pa August 3 – 5, 2018 Agenda

#### **Friday, August 3**

2:00 – 4:00 p.m.	Registration.....	Rotunda, Nittany Lion Inn
4:00 p.m.	Keynote address..... <i>Finding the Good News on Climate and Energy</i> , by Richard Alley, Evan Pugh Professor, Department of Geosciences	Meeting Room
5:30 – 6:30 p.m.	Social Mixer.....	Alumni Lobby, Nittany Lion Inn
6:30 – 8:00 p.m.	Dinner ..... Welcome on behalf of the University, and after-dinner conversation with <b>Nicholas Jones</b> , Executive Vice President and Provost	Alumni Lounge, Nittany Lion Inn

#### **Saturday, August 4**

7:00 – 8:00 a.m.	Breakfast (Dining Room breakfast buffet).....	Penn State Room
8:30 – 10:00 a.m.	“Around the Room” ..... Summary information from all Associations/Clubs. What works well in our clubs? How can we help each other to improve, expand, serve our members, attract more members, improve service to our institutions? What do we receive and what should we hope to receive from our institutions as retirees?	Penn State Room
10:00 – 10:15 a.m.	Break, with coffee, tea, water	
10:15 – 11:30 a.m.	2018 Retiree Benefits..... <b>Jill Musser</b> , Manager, Benefits Program, Human Resources, Penn State	Penn State Room
11:45 – 1:00 p.m.	Lunch (Build your own Lunch Buffet) .....	Alumni Lounge
1:15 p.m.	Bus departs from Nittany Lion Inn for Old Main (Group photo).....	Main Lobby
1:30 – 2:30 p.m.	View Land Grant Frescoes, painter: Henry Varnum Poor. History and interpretation by <b>Anne Riley</b> , Trustee Emeritus	
2:30 p.m.	Board bus Campus Tour & The Arboretum at Penn State <b>Jane Wettstone</b> , narrator	
4:30 p.m.	Bus departs Arboretum for return to the Nittany Lion Inn	
5:10 p.m.	Bus departs Nittany Lion Inn for dinner.....	Main Lobby
5:30 – 6:30 p.m.	Wine tasting; social time.....	Mount Nittany Winery
6:30 – 7:30 p.m.	Buffet dinner	
7:30 – 8:15 p.m.	<i>Penn State and AccuWeather – A great relationship</i> by <b>Barry Lee Myers</b> , Co-Founder and CEO, Accu-Weather	
8:30 p.m.	Board bus for return to the Nittany Lion Inn	

#### ***ENJOY THE EVENING AT YOUR LEISURE***

#### **Sunday, August 5**

7:00 – 8:00 a.m.	Breakfast (Dining Room breakfast buffet) .....	Penn State Room
9:00 – 10:30 a.m.	<i>Connecting Generations: Learning, Working, Living</i> ..... by <b>Dr. Amy E. Lorek</b> , Research Associate, Center for Healthy Aging	Meeting Room
10:40 – 11:00 a.m.	Annual Meeting, Big Ten Retirees Association.....	Meeting Room
11:00 – 11:45 a.m.	Parking Lot Discussions..... Now is the time to bring up anything that we should have talked about but haven't done so yet!	Meeting Room
11:45 – 1:00 p.m.	Box lunches available for all registrants	

**SAFE JOURNEYS HOME!**  
**UNTIL NEXT YEAR, AT THE UNIVERSITY OF ILLINOIS AT URBANA - CHAMPAIGN**

## APPENDIX N – BTRA Annual Business Meeting Agenda Sample

**Call to Order** ..... Conference Chair

### Roll Call of Associations

Illinois	Michigan State	Ohio State
Indiana	Minnesota	Pennsylvania State
Iowa	Nebraska	Purdue
Michigan	Northwestern	Wisconsin

**Minutes** (previous conference business meeting)

### Old Business

### New Business

1. Schedule Review of Hosting Associations

<b>2023</b>	University of Wisconsin-Madison	<b>2029</b>	Purdue University
<b>2024</b>	The Ohio State University	<b>2030</b>	Pennsylvania State University
<b>2025</b>	University of Michigan	<b>2031</b>	University of Illinois
<b>2026</b>	University of Minnesota	<b>2032</b>	University of Iowa
<b>2027</b>	Michigan State University	<b>2033</b>	Indiana University
<b>2028</b>	University of Nebraska	<b>2034</b>	Northwestern University
2. Presentation and Invitation to the \_\_\_\_\_ Conference in \_\_\_\_\_
3. Bylaw amendments
4. Conference handbook
5. Rutgers, Maryland potentially joining BTRA
- 6.

### Announcements

Dates of other upcoming conferences

### Adjournment

## APPENDIX O – Topics Addressed for Conversation and Sharing

A time for sharing should be incorporated into the conference. The host association can develop a discussion topic list or request ideas from the attendees to start the discussion. See **APPENDIX G** for information on a suggested pre-conference questionnaire.

Encourage associations to bring folders of documents that you feel would be helpful to other associations, e.g., new member orientation, board onboarding, board member bios, bylaws, policy and procedures, and communication plans.

Host association may wish to have a whiteboard or flip chart to be used as a parking lot to record other topics to be discussed. Below are some previous topics.

- What have been your most successful strategies/initiatives for keeping retirees engaged with your association?
- What have been the biggest challenges you have faced in keeping retirees engaged?
- Membership management methods/ software used
- BTRA Comparison Spreadsheet. **See APPENDIX Q**
- Discussion of value of groups/individuals joining AROHE (Association of Retirement Organizations in Higher Education)

- Operational related items: software, operating procedures, newsletters, communication successes, lessons learned, hybrid meetings, what equipment being used
- How is your retirement association coping with move to virtual delivery of programs?
- Sponsorship of activities

## APPENDIX P – Post Conference Evaluation

It is suggested to conduct a post-conference evaluation within 10 days of the close of the conference. The results of the evaluation should be shared with the BTRA Administrative Board for future planning. A sample evaluation follows.

1. On a scale of 1-7, (7 being highest), how would you rate the 2022 BTRA conference?

Needs Improvement						Excellent	
1	2	3	4	5	6	7	

- 2, What did you like most about the conference?

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2. What did you dislike about the event?

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3. How would you rate the organization of the conference?

Very poor	Poor	Acceptable	Good	Very good
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4. Have you attended a previous BTRA annual conference? \_\_\_\_Yes \_\_\_\_No

If yes, which meetings? \_\_\_\_\_

5. Did the conference meet your expectations? \_\_\_\_Yes \_\_\_\_No

6. Overall, how satisfied were you with the Conference?

Very dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied
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7. What topics would you like to see covered at future conferences?

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8. Do you have any other comments/suggestions to improve future Conferences?

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## **APPENDIX Q – BTRA Comparison Spreadsheet**

in many ways each BTRA member association is similar and yet there are many ways that they are different. For a number of years, the associations annually responded to a questionnaire circulated by the hosting association prior to the annual conference, with results distributed at the conference. Following a conference several years ago, the results were compiled into one document for ease in comparing the associations.

Each year, the hosting association should inquire if the other associations would like a comparison topic added to the spreadsheet. Then the hosting association should circulate the Comparison Spreadsheet requesting review and changes, compile and update the information and finally distribute at the annual conference. This review should occur several months prior to the annual conference.

This document has been renamed the BTRA Comparison Spreadsheet. A copy of the 2022 comparison follows on the next page.

ACTIVITY	ILLINOIS	INDIANA	IOWA	MICH	MSU	MINN	NEB	NU	OSU	PSU	PURDUE	WISC
Year began	1971	1975	1995	1953	1949	1976	1961	2001	1983	1947	1976	1999
Number of retirees/emeriti*			715 (Association members)	10,000	4,700	552		~650	>20,000	>6,000	>5,000	2,100
Living locally			579	5,000	605	527	466	~350	>12,000		65%	1
Memberships growing/declining	1,850	420	G	2,079	G	expect G	662	G slowly	>2,700	1,187	G	G slowly
Active members		~100	~250	n/a	600	228	150	120	110	~250	>2,900	20-25%
Dues (state and local)	\$41/yr	\$25 1yr; \$30/couple	1 yr free, \$10/yr or \$25/3 yrs, (incl spouse, partner)	\$15/yr	none	\$30 single, \$40 couple	1 yr free, then \$25/yr	none	\$25/yr w/spouse, \$500 life	1yr free; \$15/3 yrs (incl spouse, partner)	none	\$30/yr; \$150/6 yr; \$400/life (incl. spouse/partner)
Exec. Comm/Board number	12		12	15	8	5 + 12	17	5+6+2	26-28	12	15	14
Newsletters/yr	2	8	10	3	7	8	2	4	12	4	10	10
General meetings/yr	2	8	1 general + monthly mtgs	9	Sept-May	8	5 or 6	9	11	6	12	1 annual mbship mtg + 30-40 program seminars
Interest groups	none		2	n/a	15	5	OLLI	3 (developing more)	8+10 comm.	n/a	yes	10
Joint programs with OLLI	no		no	no	no	no	2/term	no	no	no	no	no
Formal relations with Alumni	no		no	exploring	no	no	yes	no	w/in alumni assn.	no	no	developing
Dedicated space	Small Campus office	Meeting space	no	Small office & mtg. room access	yes	no	Room access	Small office & mtg. room. Access to larger rooms	file, cust. Serv. Staff	no	no	small cubicle
Primary liaison with home University (NB: different than "formal relations with Alumni" (above))			None	Human Resources for President's Office				Provost's Office	Alumni association	Human Resources	Human Resources	none
Access to Univ. licensed software (Y/N)			N	N			Y	Y		No	No	No (institution license no longer allows)
Free (F) or Purchased (P)			-	Access to data			P	P			-	
Approximate annual operating budget			\$7,000	ca. \$40,000			ca. \$17,000	ca. \$20,000 plus salary for a 15 hr part time person		ca. \$8,000	\$17,000	\$56,000
Source(s) of funds (e.g., dues, Univ. sources, outside sources?)				Dues, contributions, sponsorships, small grants from the University			Dues & Interest from Funds at NU Foundation	Provost		Dues	University	Dues, event fees, interest

\* Query from AI: does this mean ALL retirees or those active in your organization?

Rutgers and Maryland not included, no info