

CONFERENCE GUIDELINES

**PREPARED BY
CONFERENCE STEERING COMMITTEE**

**OREGON CHAPTER
AMERICAN PUBLIC WORKS ASSOCIATION**

INDEX

CONFERENCE GUIDELINES

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PLANNING TIPS

- 4 Time lines are completion dates, not start dates
- 4 Obtain lots of involvement from others
- 4 Coach & support others, do not delegate
- 4 Hold regular meetings
- 4 Use themes

ABOUT THE GUIDE

- 4 Copies of the Conference Guidelines may be ordered from Event Solutions Inc., 541-928-5055, or you may photocopy it to save money.
- 4 Suggestions for improvements are welcome. Thank you!

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INTRODUCTION

This guide was developed by the Conference Steering Committee to offer organizational assistance to the needs and goals of providing high quality conferences.

The Oregon Chapter of APWA presents two conferences each year; one in the spring and one in the fall. These conferences are typically three days, running from Wednesday through Friday. The Wednesday program is composed of an educational program (one-day workshop), social activities, special functions (golfing, tennis, fun runs, etc.), and Committee meetings. Thursday and Friday programs consist of concurrent technical sessions with the program concluding after an awards luncheon on Friday. A conference de-briefing meeting held directly after the awards luncheon.

The ever increasing cost of conferences, the need to give the facilities a precise head count, the need for long range planning, and the increased work load of the members of the Chapter has necessitated the development of this guide.

GOALS OF THIS GUIDE

This guide was developed in order to:

- Reduce last minute panic situations.
- Reduce the work load on the Local Conference Committee.
- Provide a reference guide for each of the committees involved in the conference.
- Avoid “re-invention of the wheel” for each conference.
- Provide for systematic, consistent, repeatability and continuity in the conferences.
- Provide high quality conferences that meet the needs of the Oregon Chapter members.

GENERAL ORGANIZATIONAL STRUCTURE

This guide gives specific information on the following:

- Registration process
- Program development
- Budgeting process
- Time lines
- Chronological order of events

The guide also describes the organizational structure, authority and responsibility of each of the committees associated with the planning and implementation of each conference. It gives specific information on the interaction of the conference committees in relationship to the Executive Committee and the Standing Committees within the Oregon Chapter of APWA. This is a guideline only, the Local Conference Chair may modify these procedures to meet their needs. Each Local Conference Chair may tailor committee structure and responsibilities as appropriate for that conference. The guide is based upon experience that has provided quality conferences.

The organizational chart for the conferences is shown on the next page. It is not necessary to have separate committees for each of the functions noted below. Each conference chair has the option of combining the various committees as he or she sees fit. As in most organizations, the assignment of responsibility and delegation of authority for carrying out these responsibilities will help to improve the end product. While responsibility may be combined, it is important that all tasks be included in the planning and operation of conferences.

HOW TO USE THIS GUIDE

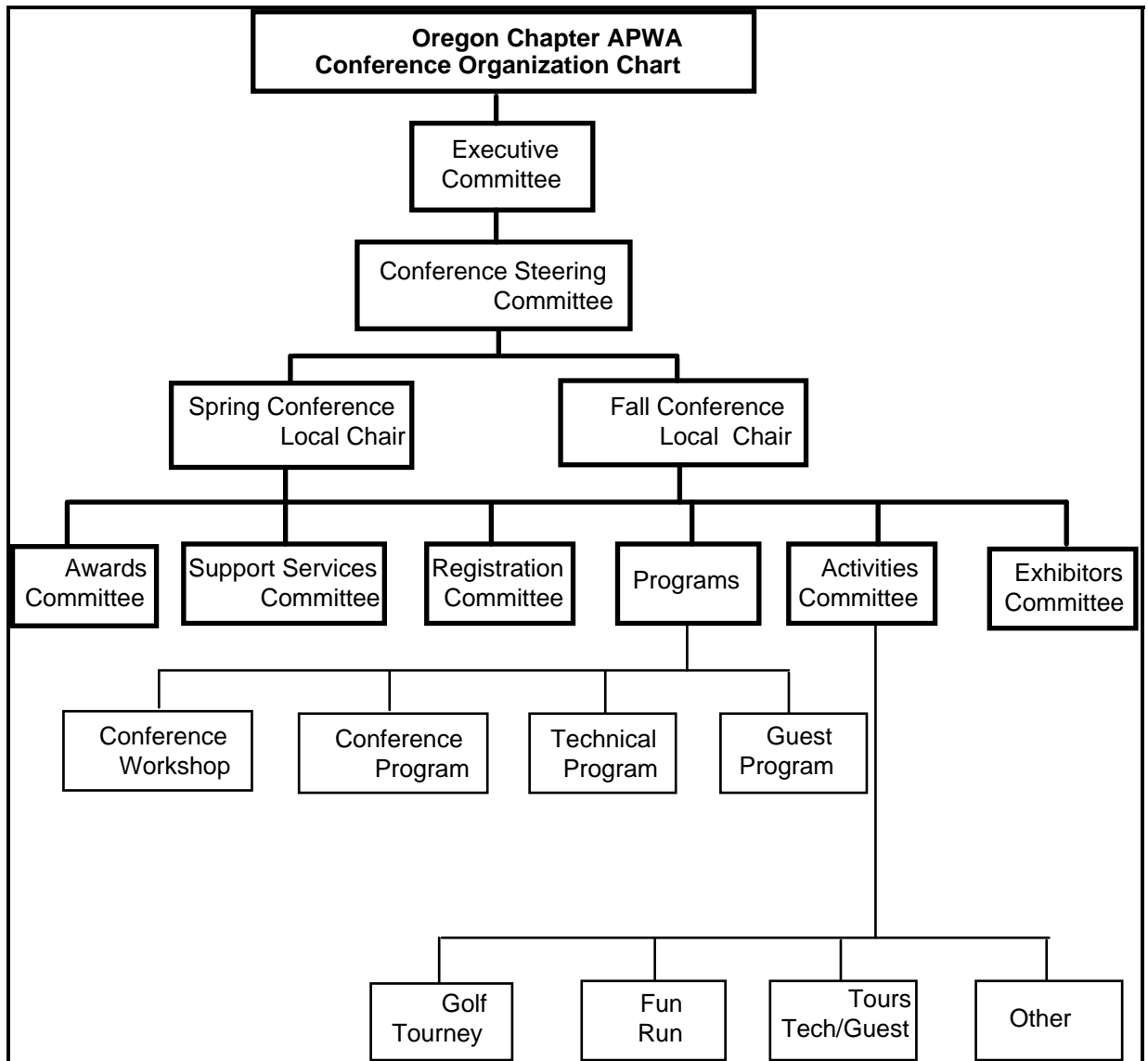
1. Read through the guide.
2. Copy each of the committee responsibility listings and giving them to the appropriate committee chairs.
3. Review the committee responsibility listings with the committee members.

4. Make appropriate changes to the responsibility listing and procedures.

RELATIONSHIP BETWEEN THE CONFERENCE AND EXISTING STANDING COMMITTEES

Where appropriate, every attempt should be made to utilize the existing Standing Committees in the design and management of conference committees. One such relationship is the relationship between the Program Committee, the Conference Workshop Committee, and the Education Committee. The Workshop Committee is usually chaired by the Education Chair. The Education Committee has the responsibility for the workshop topic selection as well as for the details of the workshop. However, the workshop topic should be consistent with the conference theme.

Other examples are the use of the Standing Committees, e.g., the Computer-Use Committee to help with technical sessions on computers, the Administrative Management Committee for help on topics associated with supervision and management, the Emergency Management Committee for help on topics associated with emergency responses, and etc.



RESPONSIBILITIES

The description of the responsibilities and roles described herein are only in relationship to the semi-annual conferences sponsored by the Oregon Chapter of American Public Works Association.

EXECUTIVE COMMITTEE

The Executive Committee is the Chapter governing body and is sometimes referred to as the "Board of Directors." Their roles are:

- Provide overview guidelines to the Conference Steering Committee.
- Review and approve recommended policies and procedures adopted by the various Standing Committees.
- Review program (Pre-conference workshop, technical program, guests)
- Understand and support the roles of the Conference Steering Committee.
- Approve any contract or obligation entered into by the various committees. These typically include contracts with conference facilities.
- Set general budget guidelines. (see pages 35-49)
- At least one member of the Executive Committee participates on the Technical Program Committee.
- Authorize support services through (currently ESI) for budget and registration preparation using standardized PC based software.

Note-The "budget and financial" Task Force recommends that Conference Chair bring proposed budget to the Executive Committee for approval-to set guideline for profit expected.

CONFERENCE STEERING COMMITTEE

The Conference Steering Committee is selected by the Executive Committee and consists of a minimum of four members. This committee has general responsibility for conference site selection, conference direction, conference finances and selection of the Local Conference Chair. It is advisable for this committee to meet at previous conference de-briefing meeting to begin planning for the next conference.

The committee will be composed of:

- Local Conference Chair (appointed by the Executive Committee)
- Education Chair
- Exhibitor's Representative
- An ex-Local Conference Chair (Chair must have held this position not more than two years prior to this appointment.)
- A retired Active/Associate member
- An Executive Committee member
- Chapter Conference Board Liaison

This committee has the responsibility to assume the following roles:

- Provide oversight and coordination of the Chapter conferences
- Provide uniformity, continuity and guidance for Chapter conferences
- Provide long-range scheduling of conferences
- Provide budget guidelines and coordination with Chapter budget
- Provide program coordination by:
- Assist in establishing each conference theme (see page 79)
- Provide the program committee with a list of current topics of interest to be considered during program development
- Keep the Executive Committee informed through monthly reports. See the monthly report form in the appendix.
- Review and evaluate each conference. Coordinate with the Local Committee Chair to obtain necessary information for the archives.

This committee has the decision making responsibilities for:

- Selecting conference locations (geographical)
- Selecting conference dates - The dates should be set at least two years in advance.
- Selecting conference facilities (pages 25-31)
- Appointing Local Conference Chair
- The Conference Steering Committee will meet with the Local Conference Chair and Committees for the purpose of reviewing these guidelines, enumerating responsibilities, and producing other information as required or desired by the Local Conference Committee.

LOCAL CONFERENCE CHAIR

The Local Conference Chair is selected by the Conference Steering Committee. The Local Conference Chair reports to the Conference Steering Committee.

Special Note: It is recommended that the existing Standing Committees be used in the development of the conference program and in the selection of speakers. Executive Committee now becomes involved.

The Local Conference Chair has the general responsibility for establishing the conference theme, appointing the various committee chairs, verifying time lines, budgeting, coordinating with the facility, preparing reports, handling all moneys associated with the conference, keeping the Steering Committee informed and giving general direction to the conference. Whenever appropriate these tasks should be delegated to other committees. The position of Local Conference Chair is basically management of the conference.

Specifically, the Local Conference Chair is responsible for the following:

(The local chair should use the wisdom of those who have "done it before" See pages 80-81)

- t Facilities Planning (pages 25-31)
 - Facility contract negotiated by Conference Steering Committee
 - Develop Conference Theme with Technical Program Chair
- t Establish local committees:
 - Registration
 - Exhibitors
 - Support Services (Printing, mailing, etc.)
 - Activities (Golf, Tennis, Tours, etc.)
 - Awards
- t Establish time tables (refer to pages 32 & 33)
- t Make arrangements for the entertainment
 - Select keynote speaker for opening session and Thursday lunch
 - Banquet
- t Prepare a budget (refer to pages 35-49)
 - Coordinate with Chapter Treasurer
 - Prepare estimates - Profit information from Executive Committee (This should follow the budget explanation and example on pages 41-42)
 - Set up a bank account at a local bank
 - Discuss with Executive Board the possibility of one bank account for all conferences to reduce hassle of opening a new account twice a year.
 - Establish a Chart of Accounts utilizing Quicken software - see pages 37-40
 - Pay bills

- t Arrange for complimentary registration, meals, accommodations, etc.
- Coordinate with Chapter Executive Committee to invite national APWA dignitaries and determine who will be attending.
- The conference should provide complimentary registrations and accommodations for National APWA dignitaries and guest, and for Chapter Scholarship Recipients.
 - The conference should provide complimentary accommodations for the Chapter President and guest.
 - The conference typically furnishes breakfast or lunch for speakers on the day(s) that they are speaking at the conference.
 - The conference may need to provide meals, registration and accommodations for recipients of the scholarships. This should be coordinated with the scholarship committee.
 - Scholarship recipients are expected to share their room with other students of the same gender.
 - Meals and basic registration may be provided for student members to encourage their attendance.
 - Up to ten students (non-scholarship recipients), may have conference fee waived and receive one complimentary lunch. Committee may choose to set up donation of extra or unused meal tickets for students and retirees. A “donation box” may be placed at the registration table.
 - All retiree, active, life, and honoree members have their basic registration fee waived but must pay for meals and other special activities.
 - Photographer should be provided a complimentary registration, including meals.
- t Coordinate all activities of the other conference related committees including room/space at all locations
 - Send a letter to the Standing Committee Chairs asking for information on needed meeting space requirements.
- t Report to the Steering Committee Chair
 - Make regular contact with Steering Committee Chair on a monthly basis
- t Arrange publicity
 - Newsletter articles (2 prior to conference, 1 after)
 - Some form of advance promotion. This may take various forms, postcards mailed soon after a previous conference (*3-1/2 -to 4 months prior to conference*), lapel pins handed out during a conference, a special newsletter, etc..
 - Establish the design of the conference brochure (see pages 50-52)
 - Maximize effectiveness of conference program used in pre-registration packets
 - Chapter web page (www.oregonapwa.org), verify that the web page has correct dates and location. Get detailed information on as soon as it is available (contact webmaster@oregonapwa.org). Coordinate with registration committee.
- t Obtain early registration gift/prize(s)
- t Arrange for meals

- Meal Functions - Based on experience guaranties usually are about 85 - 90 percent of tickets sold. No shows usually represent 10 - 15 percent. Best to be slightly under. Catering will usually provide for 5 - 10 % overrun.
 - Decide on menus.
 - Coordinate meal count with catering
 - *Remind attendees to give advance notice of special meal requirements*
 - Use of extra meal tickets for sale to members or gift to students(?)
- t Obtain a photographer
- Make arrangements for a photographer ((page 24)
- t Arrange for local official to welcome delegates at opening session (before keynote speaker)
- t Coordinate on-site activities
- Coordinate with Chapter President to script opening session and announcement at each meal. (who says what, when, for how long)
 - Provide for placement of directional/informational signs and name plates during technical program
 - Provide location for Golden Knuckle
 - Provide for collection of meal tickets *(1-2 people per session/meal)*
 - Provide for collection of session and other door prize tickets. Make arrangements for receptacles for the door prize tickets.
- t Conference Evaluation
- Evaluations forms for delegates and guest programs attendees will be designed, printed, and handed out during the conference. They may be included in the delegate packet. Provide a drop box at the registration desk. At the awards luncheon a final announcement should be made for delegates to return their evaluation forms. The forms should be reviewed at the post conference de-briefing.
 - *Have a drawing with cash prize at awards luncheon. (draw one evaluation out of box).*
- t Post-conference de-briefing session
- Conference debriefing session will be held the last day of the conference immediately after the awards luncheon. The purpose of the meeting is to identify successes and weaknesses of the conference and list suggestions and improvements for future conferences.
 - Participants that will be present: Local Conference Committee members, next conference committee members (at least the chair), and representative of the Conference Steering Committee, and the Executive Committee.
- t Prepare final conference report - See pages 59-60
- Send report to the Steering Committee Chair
 - cc to Chapter president
 - cc to next Local Chair
- t Final report
- t After conference newsletter article.

REGISTRATION COMMITTEE

The Registration Chair is selected by the Local Conference Chair and reports to the Local Conference Chair. The Registration Chair is responsible for selecting other committee members as appropriate or carrying out the responsibilities, tasks, and assignments.

The Registration Committee has the overall responsibility for handling all tasks associated with receiving and tracking registrations and associated moneys. It is preferred the receipt of funds be logged utilizing the Lotus template associated with this guide and described on page 44. The budget amounts should be entered into the Dollars and Cents or Quicken Accounting package.

More specifically this committee is responsible for:

- t Staffing
 - Identification of a chair and members
- t Receipt of registrations
 - Pre-registrations
 - On-site registration
 - Use computer format w/receipt
 - Make photocopy of check if there is no check stub
 - Prepare list of conference participants, (name, position, phone number, title, agency and what portions of the conference they registered for). Make list available for participants by morning of last day of conference.
 - Use of a spreadsheet to track registration is strongly encouraged.
 - Send registration information to Event Solution, Inc. as soon as the flyer is ready to be printed so ESI can setup internet registration to correspond with the flyer mailing (see page 52)
 - Coordinate with Program Chair to get program info on the Chapter's web page.
- t Credit Card Payments
 - Include credit card option on registration form
 - Internet registration allowed only with credit card
 - Contact Event Solutions, Inc. at 541-926-0044 to arrange for processing of credit card payments (see page 50-51)

t Registration packets

- Badges

Note: Name badges, paper inserts, ribbons may be ordered from Event Solutions, Inc. since they typically keep a supply on hand. See page 61 for prices and an order form. If you wish to order a different style, allow time for shipping from the east coast. ESI can provide you with the names of quality badge companies. ESI provides OC-APWA association support and event coordination for OC-APWA's Education Program. Phone 541-926-0044 or 541-928-5055.

- Program (including facilities map)
- Meal & door prize tickets
- Local brochures
- Receipts
- Pre-registration prize/gift (coordinate with Awards Committee)
- Any other responsibilities assigned by the Conference Chair

Note: National Presidents (and guest), photographer, and Chapter Scholarship recipients receive free full registration and lodging. Life members and retired members (self-described) receive free registration, but are responsible for paying for own meals and lodging.

- t A phone should be available at the registration desk. An in-house phone may be requested from the hotel. A cell phone should be used for outside calls.

SUPPORT SERVICES COMMITTEE

The Support Services Committee chair is selected by the Conference Chair and reports to the Local Conference Chair. The Support Services Committee chair is responsible for selecting other committee members as they see appropriate.

This committee holds a key role in the conference and is the center of input from various committees including: Registration Committee, Awards Committee, Program Committee and Workshop Committee. This committee is generally responsible for all printing activities, transportation activities and all purchases except prizes associated with special activities.

More specifically this committee is responsible for the following tasks:

- t Identify printer(s)
 - t Type set and layout of conference materials
 - t Postcard Mailing
 - Send postcards 3-1/2 to 4 months in advance, bulk mail works well.
 - Arrange for and obtain mailing labels
- Presently the mailing list is available as labels or in electronic form from:
- Pat Vargas
5018 SE 36th Avenue
Portland, OR 97202-4129
(503) 771-9074
- Make arrangements for bulk mailing
 - Purchasing
 - t Printing
 - Tickets for meals and session prizes (different colors for each meal ticket are helpful)
(see page 62 for meal ticket examples)
 - Conference brochure (Pre-conference and Final)
 - Macintosh - Quark Express or Page Maker Software (first check with print shop for compatibility)
 - Name tags (name, title, organization)
 - Speaker, moderator & head table name plates
 - Advance mailers
 - Directional/information signs
 - Exhibitors and contributors display signs
 - t Assemble registration packets
 - Purchase name tags, badges, and ribbons (Speaker, Director, First Timer, etc.) from Event Solutions, Inc - See order form on page 61

- Misc. packet inserts
 - Conference pins/stickers
 - Purchase Conference materials packet
 - Purchase envelopes for mailing (mailing envelope must be printed with bulk mailing return address if bulk mailing is used)
 - Pre-registration gifts/prizes
 - Neck lanyards for name tag holders. These are very popular. Purchase enough for all attendees. (delegates, guests, all exhibitor representatives, speakers, and conference staff) 2000 Spring Conference needed 350.
- t Prepare conference brochures
- Be sure to include conference contact name and phone number
- t Conference Registration
- Mail First Class, two months in advance from the host location. Send 1st class! Give exhibitors several months advance notice as well. It makes a difference if you offer an early registration discount. Be prepared to fax forms to people calling to say they never received their forms. If you offer cancellation refunds, remember that you may not be able to change your meal count guarantee. Meal cost for full registration is around \$100.
 - This mailing should take place at least 7 weeks prior to the conference. The mailing should include:
 - Preliminary program
 - Registration form
 - Lodging information
 - Map to conference location and lodging
- t Arrange for transportation (tours, shuttle service, etc.)
- t Gather information & brochure design from the Local Conference Chair
- t Provide bulletin board for announcements, jobs available, etc.
- t Assist at Conference as assigned
- t Arrange for staging area/room
- t Take responsibility for chapter banners and appropriate display. The support services chair should review inventory passed on from previous conferences in order to make use of all appropriate materials. Also, the Support Services Chair shall, at the close of the conference collect all materials and inventory items and see that they are transferred to the following Conference Chair.
- t Banquet/Awards Luncheon Decorations
- Coordinate with local Conference Chair and Support Services

PROGRAM COMMITTEE

- The Program Chair is the Chapter Vice President and reports to the Local Conference Chair.
- The Program Committee is responsible for the Workshop Program Committee and the Technical Program Committee.
- The Workshop Chair is the Chapter Education Chair.
- The Technical Program Chair is selected by the Program Chair.

Conference Workshop Committee

The Conference Workshop Committee is chaired by the Education Chair. The conference workshop is primarily the responsibility of the Education Committee; however, the Education Committee will report to the Program Chair on all activities associated with the conference workshop.

Specifically the Conference Workshop Committee is responsible for the following:

- Coordinate with theme and technical program of conference
- Develop topic for workshop
- Arrange for workshop speaker(s)
- Coordinate with Awards Committee for speaker gift(s) and door prizes.
- Coordinate space and need for refreshments with Local Conference Chair
- Develop a budget and determine registration fee
- Coordinate with the Registration Committee
- Determine printing needs and mailing needs
- Provide promotional materials to Local Conference Chair
- Coordinate with Support Services for audio/visual equipment

Technical Program Committee

The Technical Program Chair is responsible for obtaining the members of the technical program committee. It is suggested that the following be considered as members of the committee.

- The Technical Program Chair from the last conference
- The Education Committee chair
- At least one member of the Executive Committee
- Local Conference Committee Chair
- Chairs of the last two Street Maintenance Short Schools
- The chairs for workshop activities that may be included in this conference. A typical workshop activity would be the annual Safety Conference.
- Someone representing each the Standing Committees that have responsibility for topics that will be part of the program.

This committee holds the key to the program content and therefore a primary key to the success of the conference. Specific suggestions on how to successfully develop a program are offered in the Appendix.

Specifically the Technical Program Committee is responsible for the following:

- t Coordinate with Education Chair
- t Establish the theme of the conference with the local Conference Chair
- t Design the technical program (*determine technical sessions at prior conference debrief*)
 - Length (*Allow plenty of time for attendees to visit exhibit area, mingle, and network.*)
 - 45 minutes per session
 - If exceptional topic, use two or more sessions
 - Recommend 45 minutes devoted to exhibits
 - Style
 - Categories
 - Number of concurrent sessions
 - Suggest at least three, but not less than two
 - Looking for quality rather than quantity
 - Not just filling time
 - Provide balance in program for all participants
 - Speaker selection
 - Request speaker bio's for CEU's and introductions
 - Follow-up letter (see page 69)
 - Determine A/V needs and coordinate with support services. Encourage speakers to use Power Point.
 - Biography and abstract - Send information to Program Chair and Moderator, get in electronic form from speakers if possible.
 - Supply program information for brochure
 - Send information to Local Conference Chair
 - Get CEU approval of speakers (see pages 71-78)
 - Select Moderators
 - Introduce speaker
 - Hand out/collect tickets
 - Coordinate with Support regarding A/V equipment, door prizes and title on door
 - Obtain head count at each session. These numbers should be in the final report
 - Assign rooms to each concurrent session

- Forward room setup and design information to Local Conference Chair for Facility Planning.
- Write newsletter/publicity articles about Conference
- Obtain A/V equipment-Coordinate with Support Committee
 - Have speaker supply A/V equipment if possible (important if any specialized equipment is needed)
 - Try to obtain A/V equipment from public agencies without cost
 - Check equipment availability against equipment that may be rented from conference facility.
- t **Technical Tours** - These tours are specifically designed for the attendees needs.
 - The tours should be consistent with Conference theme
 - The tours are typically part of the pre-conference activities (typically scheduled on Wednesday)
 - Arrange for:
 - Tour site
 - Transportation-Coordinate with Support Committee
 - Gathering location to meet transportation
 - Development of budget (fee/cost)
 - Advertisement information -
 This information should be forwarded to the Support Services Committee
 - Registration information - Send information to the Support Services Committees
 - Thank you letters to tour sponsors

PROGRAM DEVELOPMENT GUIDELINES

This set of guidelines was developed to be used by the Technical Program Committee.

Note:

- It is to the advantage of all involved to utilize existing Standing Committees in the development of the conference program and selection of speakers.
- The Program Committee should meet at least twice. The first meeting should be 20 weeks before to the conference.
- The second meeting should be 14 weeks before to the conference. General topics of the two meetings are:
- First meeting is the post conference meeting - Determine topics, subject areas, conference theme, and potential speakers.
- Second meeting - Finalize topics, speakers, and sequence of topics.

First meeting - The first meeting should be done as a brain-storming session with the entire Program Committee. The following method has been successfully utilized. Some facilitators prefer to reverse the order of steps 1- 3.

1. Identify a theme
2. Identify the general subject areas (Professional Development Technical Development and Personal Development are common subject areas)
3. Brainstorm topics that fit under each of these areas. The topics should be written on flip chart pages and hung on the wall.
4. Prioritize the topics.
5. Identify potential speakers.
6. Place the topics into a typical schedule - again utilizing the flip chart pages. (There are commonly some speakers and/or topics left over. Place them on a separate page.)
7. Identify individuals on the committee who are willing to be responsible for making initial contact with the speakers.
8. As speaker information is gathered it should be given to the Program Chair., who is the Chapter Vice President.
9. Contact the Program Chair if there is a problem with a speaker or topic. At this time the Chair can use one of the reserve topics or speakers.

10. The Chair or another individual should take the flip chart pages and type them into a data base. This data base should include the following fields:

- Topic
- Short Description of topic
- Length
- Date
- Start time
- Speaker first name
- Speaker last name
- Speaker title
- Format - individual speaker, forum, panel, etc.
- Speaker employer name
- Speaker phone number
- Speaker address
- Speaker City
- Speaker State
- Speaker Zip
- A/V requirements
- Confirmed

11. This data should be sorted, printed, and distributed at second meeting.

Second meeting - At this session the program should be reviewed, appropriate changes and/or additions made and finalized.

GUEST COMMITTEE

The Guest Chair is selected by the Local Conference Chair and is responsible to the Local Conference Chair. The Guest Chair must work closely with the Local Conference Chair and the Program Chair to assure that guest activities are coordinated with the other activities of the conference.

The Guest Chair is responsible for selecting other committee members as they see appropriate. The Guest Committee is generally responsible for all guest activities. More specifically the committee is responsible for:

- t Develop a budget and determine registration fee (should break even, no profit)
- t Establish and host a hospitality Room
 - Coordinate with Local Conference Chair for space
 - Provide for decorations in hospitality room
 - Provide for refreshments
 - Arrange for hosts/hostesses
 - Room should be available to all conference participants and guest.
 - Should be located close to the registration area
 - Handicap accessible
- t Develop and Coordinate Planned Activities
 - Breakfast
 - Luncheon
 - Scenic/Historical Tours
 - Style shows, Arts and Crafts, Musical
 - Shopping/Free Time
 - Guest should be invited to participate in special activities
 - Guest are welcome to participate in any technical program activity
- t Obtain Prizes/Gifts
 - Coordinate with Support and Awards Committee and Purchasing
- t Transportation for Guests for their Activities
 - Coordinate with Support Services
- t Remember - Guest may be of either gender and may not be a spouse
- t On the flyer guests should be made aware of which meals, tours, bus rides, etc. are covered and not covered by their registration fee

Some guests who have not paid guest registration, come to hospitality breakfasts. They should be asked to purchase tickets for that meal.

EXHIBITORS COMMITTEE

The Exhibitors Chair is selected by the Local Conference Chair and reports to the Local Conference Chair. The Exhibitors Chair is responsible for selecting other committee members as they see appropriate.

The Exhibitors Committee is responsible for the advertising, registration, coordination and problem solving associated with the exhibitors. Exhibitor Information

The Exhibitor Committee commonly contacts the exhibitors ten weeks prior to the conference. This contact takes the form of the example letter and form on page. *It is not meant to be used as is, but rather as a guide.*

Make 3 photocopies and distribute as follows:

- Vendor keeps one copy
- 2 copies are to be returned to the exhibitor committee
- The exhibitor committee will retain one copy
- One copy will be forwarded to the registration committee

More specifically the Exhibitors Committee is responsible for:

- t Maintenance of mailing list of local suppliers
 - Coordinate with Pat Vargas
5018 SE 36th Ave.
Portland, OR 97202-4129
503-771-9074
- t Writing and mailing of registration letter (include conference registration for food, golf, etc.)
- t Maintenance of exhibitors registration list - See appendix for example of required data
- t Working with facility to arrange for space
 - Coordinate with Local Conference Chair in facility planning process
- t Sponsor and arrange for:
 - Social
 - Coffee breaks
 - Continental breakfast

(Note: All food, drink, refreshments, and catering are to be accounted for under conference budget items and must be coordinated through Local Conference Chair.)
- t Should have soft drinks and pastries available in mid-morning and afternoon. Coffee in early a.m.
- t Develop a budget and set and collect sponsor registration fees (should break even, no profit)
 - In advance and at conference
 - Typical fee is \$225/table (1996)
 - Funds are turned over to Local Conference Chair along with registration list
- t Send registration information to Support Services Committee for program, display sign, name tags and ribbons.

- t Send Conference registrations to Registration Committee for registration packets
- t Make table assignments from exhibitors registrations
 - Confirm table assignments to exhibitors
- t Arrange table lay-out —coordinate with Local Conference Chair
 - Make sure arrangement is inviting to conference attendees. If space is too confined, people are less inclined to want to look around.
 - Need tables for exhibitors and refreshments
 - Put refreshments in the back or middle of room to draw people past exhibits
 - Order refreshments to be delivered just before breaks
- t Arrange for:
 - Table drapes/skirts
 - Electrical hook-ups
 - Outside exhibit space
- t Mail list of conference attendees to exhibitors (This list can be obtained from the Registration Committee).
- t Important : Frequent reminders for attendees to visit Exhibitor Area. Exhibitors are an important part of the conference.
- t Establish exhibitor's evaluation of conference to get feedback.
- t Exhibitor registration does not include the conference registration, However, exhibitors are welcome to attend technical sessions. This needs to be made clear in the invitation letter.
- t Exhibitors are an important contribution to the conference. Someone should be in charge of maintaining frequent communication during the conference with exhibitors to maintain rapport and address any concerns.
- t Prepare list of exhibitors for delegates to have initialized at exhibit tables for a chance to win prizes at the end of the conference. (has been six \$50 bills and one \$100 bill)
- t Exhibitor registration should include one ticket for lunch on Thursday or Friday.

ACTIVITY COMMITTEE

The Activity Chair is selected by the Local Conference Chair and reports to the Local Conference Chair. The Activity Chair is responsible for the selection of other committee members and they see appropriate.

The Activity Committee generally is responsible for all conference associated “fun” activities. These activities could include, golf, tennis, fun runs and tours.

More specifically the committee is responsible for:

- t Deciding what activities will be associated with the conference
 - The following is a listing of the responsibilities for setting-up and operating the golf tournament. The steps indicated with a (*) are also required any time a tennis match or fun run is included in the activities.
- t Select facility (prefer 18-hole, but 9-hole is acceptable)
- t Develop a budget for the event
 - Event should break even
 - Send copy of budget to Local Conference Chair
 - Follow budget guidelines
- t Determine fees
 - Greens fees
 - Prize fund
 - Golf carts and club rental are arranged by the individual players but could be included when arranging with golf course.
 - Refreshments
- t Determine start time and tee times
 - Tee times 1 to 1 1/2 hours
 - Groups of four arranged by the individual players and Activities Chair
 - Coordinate with registration committee to include golf partner preference on registration form.
- t Scoring system
 - Calloway (software available)
 - Score cards submitted to the Activity Chair
- t Award prizes at Friday’s Award Luncheon
 - Designate Master of Ceremonies
 - Award Tee prizes
 - Long Drive, KP’s, etc.
 - Award lap prizes
 - Award prizes for other special activities

t Scholarship Fundraising

- Solicit sponsors for holes, certs, refreshments
- Coordinate with Foundation

t Wine at Banquet

- Solicit consultants to supply wine for banquet
- Coordinate with fundraising for Foundation
- Print table tent acknowledgments of contributors and have placed on banquet tables.

AWARDS COMMITTEE

The Awards Chair is selected by the Local Conference Chair and reports to the Local Conference Chair. The Awards Chair is responsible for the selection of other committee members as they see appropriate. Generally the Awards Committee is responsible for the coordination of all activities associated with purchase and distribution of awards associated with the conference. The Awards Committee is not responsible for the distribution of special awards given by the Chapter or National in conjunction with the conference.

More specifically the committee is responsible for the following:

- t Select and acquire special activity awards
 - Coordinate with the Activity Committee and Support Services Committee
- t Budget and use budget as guideline
- t Use pre-printed, numbered tickets when appropriate
- t Purchase and award the following prizes
 - Speaker Gifts (\$15-\$20)
 - Session Prizes (\$10-\$15) (Award at sessions)
 - Delegates Grand Prize (\$100)
 - Guest Grand Prize (\$50)
 - Pre-registration gifts/prizes
 - Gifts to be given at registration desk with registration packet
 - Prizes to be awarded at Awards Luncheon

(A typical prize is a useful, quality item. The Awards Committee is responsible for purchasing the prizes.)

 - Door prizes (\$10 and \$20)
 - Chapter meeting - This is commonly happens Friday morning. Traditionally, a \$50.00 bill is given as the award.
 - Evaluation prize (\$20)
- t Exhibitor's prizes (coordinate with Exhibitor Committee)
- t Coordinate with Activity, Registration, & Support Services Committees
- t Ticket Distribution
 - At sessions-coordinate with Program Committee
 - At Awards Luncheon
 - At Chapter Meeting (Friday AM)
 - Evaluation drawing
- t Coordinate award of prizes

Donations of special prizes is very acceptable; however, we do not want to stress the solicitation of donations from businesses associated with the Chapter. The Conference should provide adequate funds by budgeting for quality prizes.

GUIDELINES FOR PHOTOGRAPHER

The photographer is appointed by the Local Conference Chair and given any specifics which the chair wishes recorded.

Photographic coverage of conferences is perceived to be visual recording of location and happenings to assist the chair with reports, for use in the newsletter and reports to National.

General

Photographer should use 35mm camera (auto or manual) with some type of metering to assure good exposure.

For indoor flash it is suggested to use a unit capable of at least 30 feet (most small and built-in units are good only to about 12 feet). Use a color print film of an ASA between 100 & 400. Expect to use at least all or part of *eight* 36 exposure rolls. Remember - film is the cheapest thing you can use and you cannot go back for missed opportunities. If the camera needs a battery be sure it is fresh. The flash will usually need an extra set of batteries at around 40 shots as recycle time gets too long.

If your camera requires setting for flash - don't forget. Outdoor pictures should be taken at 1/250 sec or faster to overcome camera movement. Don't forget to focus if camera is not automatic.

Suggested coverage with one or more pictures.

1. General Conference facility - include sign/logo
2. Golf, tennis, fun run, tours, etc.
3. Ice breaker social
4. Opening - audience and speakers
5. Several sessions, audience and speakers
6. Equipment show, indoor and outdoor
7. Luncheon, Banquet, speakers and entertainment
8. Chapter meeting - good time to get chapter president in action
9. Awards luncheon (some awards may be given at banquet or at other times)

Good luck on your coverage - remember you cannot cover everything so pick and choose.

Normally at the end of the conference you need to just turn in the film to the Conference Chair.

DATES FOR THE CONFERENCES

Frequency

The Oregon Chapter holds two conferences each year. (Usually April and October)

Conflicts

When considering dates you should consider the following activities that could conflict with the memberships attendance.

- Street Maintenance Short School - Usually meets in April and October. Coordinate with Event Solutions, Inc. to schedule conference two weeks away from short school.
- National Water Pollution Control Federation (Sept. or Oct.)
- Opening day of hunting season in October
- Pacific Northwest Section of AWWA - Usually meets in May
- Pacific Northwest Pollution Control Association - Usually meets in October
- League of Oregon Cities & Association of Oregon Counties - Usually meet in the Fall/Mid November
- International City Managers Association - Usually meet in the Spring
- Equipment Show
- Hunting/Fishing Season (Fall/Spring)
- Construction season (Spring/Summer/Fall)
- Weather
- National APWA Congress & Equipment Show/ September
- Washington Chapter of APWA
- Wastewater Operators of WA
- National American Water Works Association (June)

Coordination of activities, location, & dates

Consider:

- Weather
- Coast location in fall-not spring
- Guest tours
- Special activities at location
- Golf
- Fun Run
- Plays - Ashland
- Others that may be special or unique to an area
- Special transportation needs for activities

SITE SELECTION GUIDELINES

Generally, site selection is the responsibility of the Conference Steering Committee. The Steering Committee should identify a Local Conference Chair before finalizing the site selections. It is important that a local committee can be organized to host the conference. When selecting a site the following should be considered:

Size of Facility

- t Number and size of the meeting rooms. This is based on the number of concurrent sessions and an average of the attendance at the last four conferences. (Note ventilation and acoustics)
- t Exhibit space. The exhibitor's space information can be obtained from the Exhibitor Chair. There must be enough space to allow the continental breakfast and refreshments to be served in the same room.
- t Space is needed for the following meals:
 - Wednesday A.M. Executive Board Meeting
 - Wednesday evening "Social"
 - Thursday - Past presidents breakfast- Informal (Coordinate with the Past Presidents
 - P.W. or special event breakfast and Committee round table
 - Thursday-Breakfast for guests (optional) - maybe cont. breakfast in hospitality room
 - Thursday - Luncheon
 - Thursday - Banquet
 - Friday - Business Meeting Breakfast
 - Friday-Breakfast for guests (optional) - maybe cont. breakfast in hospitality room
 - Friday - Award Luncheon
- t Additional space
 - Standing Committee meetings on Wednesday
 - Staging area (need room that can be secured)
 - Hospitality Room - open to guest and participants
 - Speaker preparation room
 - Provide rooms for dignitaries, as appropriate
 - Friday debriefing meeting of conference committees
- t Number and Location of guest rooms - This is based on the average number of rooms used at the last three conferences. When making these arrangements the following items need to be considered.
 - The price of lodging rooms - Single and double occupancy
 - The date the block of rooms will be released
 - The number of rooms required for each complimentary room
 - Check out time - It is preferred we have a 2:00 PM check out on Friday. Normal motel check out time is 12:00 noon

- Dignitary rooms - these should be complimentary

Aesthetics - The conference facility should be in a pleasant setting. Consider facilities for both delegates and guests.

Activities and recreation - The Activities Chair will give information on the type and number of facilities needed for activities. Typically this will include tennis, golf, and tours.

Cost - In selecting a facility it is important to consider the following regarding cost:

- Moderately priced guest rooms (government rates)
- Meals
- Refreshments
- Formula for calculating complimentary rooms, expressed in “room days”, the number of rooms used times the number of days they were rented
- Special charges - Gratuity, service charge, tax, activities, etc.
- Space charges not included in meal charges
- Charge for facilities - how is it computed (often meeting rooms rental is waived with purchase of food and beverage)

Geographic Location

- Alternating locations - Conference locations should rotate between Eastern Oregon, Central Oregon, Willamette Valley, Portland Area, Southern Oregon and the Oregon Coast. Commonly, it is best to alternate between one conference in the highly populated areas of the Willamette Valley, Portland area or Central Oregon Coast and one of the more remote area. There are two considerations for this rotation; (1) financial - typically the high population areas receive the higher attendance. The high financial gains from this conference can offset the typically lower financial gains from the conference held in a less populated area, (2) by moving the conference around the State, more of the Chapters members have an opportunity to attend.
- Urban/rural locations - Each year one conference should be located in an urban area and one in a rural location. The reasoning behind this alternation is described above.
- Joint Conference with Washington - Every four to six years the Oregon and Washington Chapters sponsor a joint conference. In order for this conference to be successful, the planning must start at least two years prior to the conference.

SITE SELECTION CRITERIA

AN APPENDIX TO THE SITE SELECTION SECTION

The sizes and numbers are based on data available in January of 1990

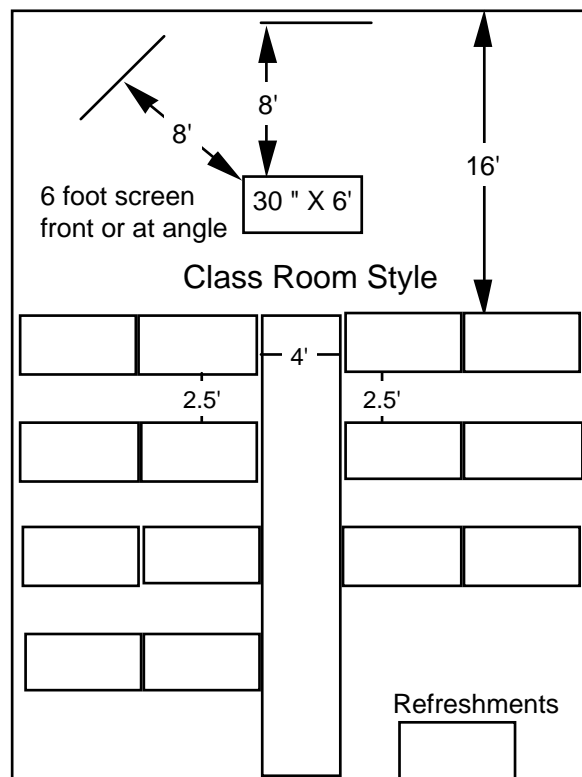
- All amounts are minimums

Executive Committee Breakfast

- Set for 20
- Rounds or available
- Need a small table in the room for materials

Workshop

- Need 1,000 sq. ft. for 30 to 40 people
- Set in class room style
- Minimum table size 30 inch by 6 foot
- Each participant will need at least 2 linear feet at the table
- See the attached drawing for preferred dimensions



Registration

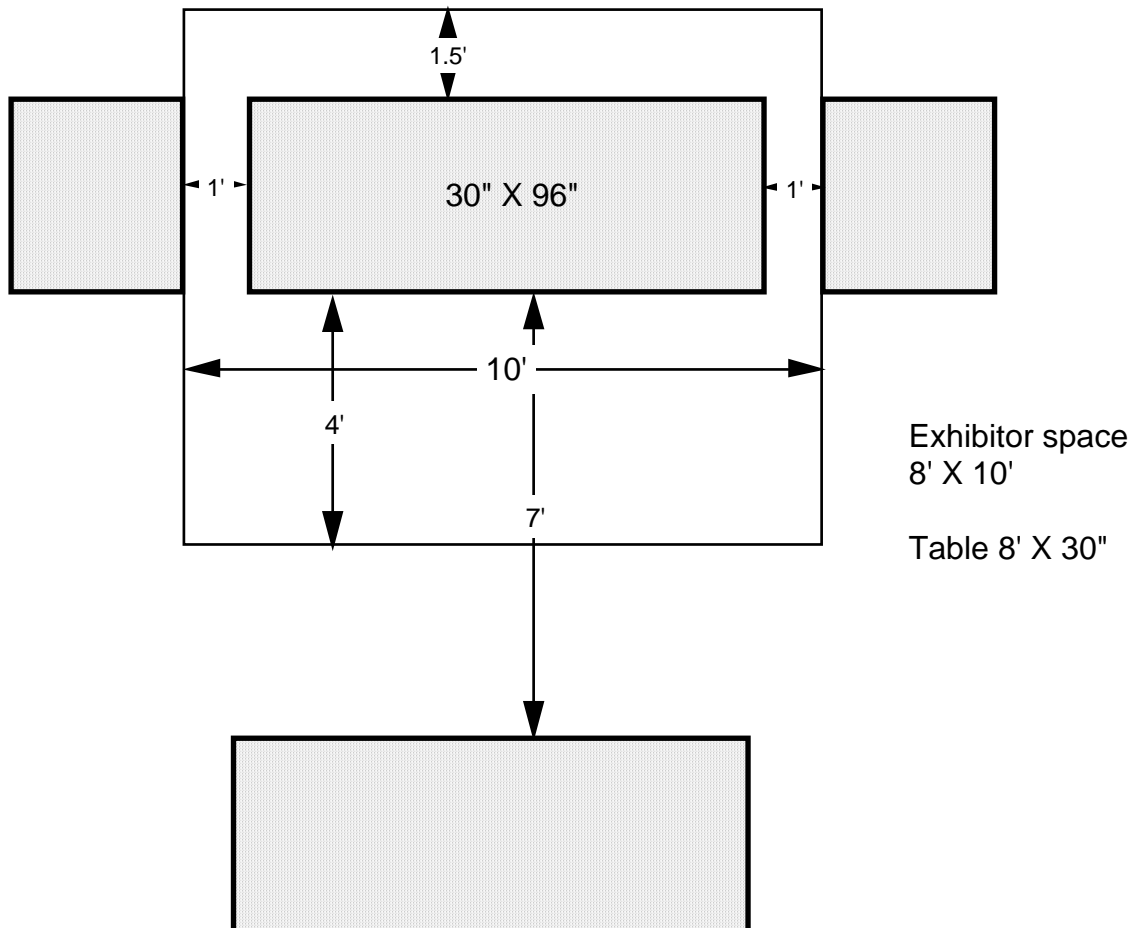
- Two 30 inch by 6 foot tables with skirts
- Three chairs
- 30 inch by 6 foot table in back of registration tables for supplies

Hospitality Room

- Need 400 sq. ft.
- Set open seating for 12-15
- Refreshments and food to be set on tables buffet style along the walls

Exhibit Space

- Need space for 35 vendors, minimum
- Use 30 inch by 8 foot tables, skirted or draped
- Minimum requirements are about 1,600 sq. ft.
- Tables to be set as shown in the attached drawing
- Need outside space for large vendor displays - space needs to be close to the activities, minimum of 10,000 sq. ft
- Electricity at every table
- Tables skirted or draped



Staging Area

- One room to hold A/V equipment and etc.

Definitions

- Theater style seating - Rows of chairs facing a head table or the front of the room
- Class room style seating - Tables and chairs facing the front of the room
- Rounds - Round tables commonly used for meals, eight maximum

Instructor Prep Room (Could also double as Staging Area)

- One room at least 20 by 20
- Needs tables and chairs
- A slide projector would be desirable but not required

Social Hour

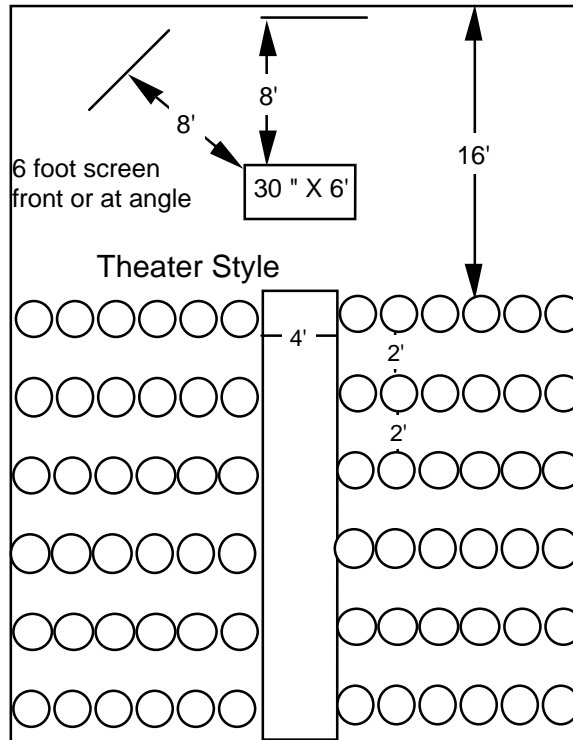
- Space for 175
- Seating for 50 to 75
- Scattered chairs
- Two wet bars
- Food should be set to allow for two lines
- Consider tall tables so people have a place to rest their plates

Opening Session

- Set theater style
- Set for 150
- Head table is optional but a podium and microphone is minimum requirement
- Riser is recommended for speaker

Technical Sessions

- Need good audio system
- Set for 50-75, depending on number of concurrent sessions
- Theater Style
- Rostrum and speaker system
- Flip charts
- Overhead Projector
- Screen
- See attached drawing for details



Lunch on First Day

- Set for 150-rounds preferred
- Head table is optional; however, a rostrum is required
- Reserve tables in front of the room for special guests

Banquet

- Set for large 200-rounds preferred
- Head table is optional; however, a rostrum is required
- Reserve tables in front of the room for special guests

Chapter Breakfast

- Set for 100
- Meal should be served as a buffet

Awards Luncheon

- Set for 150
- No buffet for this meal
- Head table not required
- Minimum needs are rostrum and quality audio system
- Reserve seating at front tables for individuals involved in making the awards

Past Presidents Breakfast

- Set for 15-20
- Need information here
- No charge to past presidents for meals

APWA CONFERENCE TIMELINE GUIDE

COMPLETION DATES

TIME BEFORE CONFERENCE	YOUR DATES	COMMITTEE	ACTIVITY
2 to 3 years	_____	Steering	Site Location Selection
2 to 3 years	_____	Steering	Select local conference chair
30 weeks	_____	Chair	Select committees
26 weeks	_____	Chair	Preliminary notification to chapter of location and dates SupportMake announcement at conference
24 weeks	_____	Chair	Give assignments, set up bank account
24 weeks	_____	Chair	Pre-conference advertising
22 weeks	_____	Support	Select Printer
20 weeks	_____	Chair	Preliminary Budget - Need information from Property and all committees concerning cost
20 weeks	_____	Chair	Brainstorming session to determine topics, subject areas and conference theme.
20 weeks	_____	Chair	Conference committee along with workshop director and others should hold "brainstorming" session to determine, topics, subject areas, and conference theme.
18 weeks	_____	Chair	Final Budget
16 weeks	_____	Chair	Verify facility contract - as personnel change at a facility so does the interpretation of the contract provisions.
15 weeks	_____	???	Postcard
14 weeks	_____	Program Workshop	Topic Selection
1			
4 weeks	_____	Chair	Housing data
13 weeks	_____	Support	Flyer Layout - Rough Draft
13 weeks	_____	Support	Tickets to Printer
13 weeks	_____	Support	Purchase Envelopes and supplies for mailing flyer Notice sent to exhibitors with regular packet, also meals and special activities notice (This could be earlier)

TIME BEFORE CONFERENCE	YOUR DATES	COMMITTEE	ACTIVITY
10 weeks	_____	Support	Flyer to Printer
10 weeks	_____	Support	Send Event Solutions a copy of flyer to prepare on-line registration form
10 weeks	_____	Support	Request CEU approval from ESAC
8 weeks	_____	Support	Flyer to label placement
8 weeks	_____	Program	Speaker Selection & Room Assignment
7 weeks	_____	Support	Mail Flyers and pre-registration packets. (First Class mailing. Add two weeks if third class.)
4 to 6 weeks	_____	Support	Final program to printer - Include menu and exhibitors
As received	_____	Registration	Prepare packets
As received	_____	Registration	Print Name tags
2 weeks	_____	Chair	Verify facility contract - as personnel change at a facility so does the interpretation of the contract provisions.
2 weeks	_____	Support	Print Speaker posters, table names, room topic names, secure A/V requirements
2 weeks	_____	Awards	Purchase awards and gifts and door prizes
1-2 weeks	_____		Compile registration packets
72 hours	_____	Chair	Final count and meal guarantee to facility <i>or other requirements as per the facility contract</i>
Event	_____	All	Conference
Event	_____	All - - plus new Steering Committee and New Chair	Debriefing
8 weeks after	_____	Chair	Final Accounting and Final Report

**APWA FALL 1999 CONFERENCE
REGISTRATION AND SUPPORT TO DO LIST:**

Conference Dates October 6-8th

WHO	WHAT	
Eric/Kim/Eugene	postcard design and printing	
Lori/support/Eugene	postcard mailing labels attached and sent	
Ken/Florence	tickets for meals and session prizes (different colors for each meal ticket are helpful)	
Eric/Kim/Eugene	create registration brochure	
Eric/Kim/Eugene	create Program Guide	
Ken/Florence	name tags (name, title, organization)	
Ken/Florence	speaker, moderator, & head table name plates	
Ken/Florence	directional/informational signs	
Ken/Florence	exhibitors and contributors display signs	
Ken/Florence	purchase name tags and holders	
Ken/Florence	purchase ribbons for speakers, directors, first timers, etc.	
Ken/Florence	misc. packet inserts	
Ken/Florence	conference pins and stickers	
Ken/Florence	purchase conference material packet	
Ken/Florence	registration gift	
Lori/support/Eugene	assemble registration packets	
Lori/Support/Eugene	mail registration brochure with registration form and lodging information: (offer early registration discount?)	
Lori/Support/Eugene	receive and process registration materials	
Lori/Support/Eugene	maintain registration budget spreadsheet	
Lori/Support/Eugene	On site registration	

BUDGET LAYOUT

The Conference Committee must make a complete and detailed financial report of the conference. This report is included within the final Conference report.

Budget Guidelines - See the following examples

- Printing:** Use local when possible but be sure they can handle the work load and meet deadlines.
- Meals:** If conference facility caters the meals, they will provide menu selections and prices. Make sure of pricing, gratuity, and guarantee requirements. When developing budgets, the total cost must be utilized and a mark up is necessary to cover complimentary meals, guarantee, etc. Food costs must include food for social, bar costs for social, hospitality and break refreshments, all meals, etc.
- Registration:** Should cover all other incidental costs including facility rentals, complimentary registrations, signs, gifts, awards, prizes, complimentary rooms for Chapter and national dignitaries. Special activities should have fees that will cover the expenses including prizes to be awarded. Guest registration should include meal costs and any other costs related to guest activities; however, the Executive Committee has recommended some or all subsidy of guest expenses to encourage guest attendance and participation. Registration should also cover such amenities as decorations, flowers, etc.
- Special Activities:** Registrations Fees for those activities should cover all costs such as green fees, carts (if provided or required), T-Shirts, prizes to be awarded, etc. Golf will do this but other activities have not as yet been self supportive. Guest tours or technical tour costs should be included in the registration for those who participate. There is better participation by guests and others if the costs are included in the registration fees.
- Checking Account:** Obtain interest bearing checking account. For example, over \$200.00 in interest was earned at the 1989 Fall Conference. There were expenses of only \$12.75 (\$7.75 of this was for checks).
- Housing:** If convention center provides housing, obtain the block of rooms for the convention and any special requirements. It may be good to also provide information on other facilities for those who do not wish to stay at convention housing. Generally, facilities above average are preferred.

Postage:

Usually registration packets are sent first class. Be sure to budget for the extra postage cost. However, the Chapter maintains a postal Bulk Rate mailing permit. This is managed by those responsible for the Chapter Newsletter. It is important to allow one additional week for sending out registrations packets when mailing at the bulk rate. Bulk Rate mailing is used the return address on the materials must be the same as for the permit.

It is sometimes possible to utilize local agency's mailing privilege for First Class mail for sending registration packets. If used, the local agency address must be used as the return address on the envelope used for mailing.

Prizes:

Some local contributions are desirable but budget for these costs. We don't necessarily want to be a "hand-out" organization. Generally, plan for Delegates and Guest Grand Prizes in the range of \$50-\$100. Other session prizes at about \$10-\$15 and the \$50 cash prize for the chapter meeting. Including speaker gifts at \$15-\$20 each, budget is approximately \$1,250. If there are special dignitaries it is nice to have some special item like a fruit basket in their room and money should be budgeted for it.

Oregon Chapter APWA

Conference Chart of Accounts

The Chapter has purchased a copy of Quicken, which is an accounting program for handling the conference accounting. This program is MS-DOS compatible. The program is transferred from conference to conference.

Example

Income Accounts

Income Account #	Item
125	Meeting Registration This will be the total registration fees charged less the costs charged for the meals or special activities that are itemized separately.
130	Meal Ticket Sales This is the amount that covers all of the meal charges and should include gratuity, guaranty, overhead, etc. Amounts shown for meals on registration form.
135	Exhibit Space Income Each exhibitor pays \$225 for each table or for each space of outdoor display area. Additional receipts from vendors , conference registrations and meals or for participating in special functions are itemized in other appropriate accounts.
150	Special Functions Amounts charged for any of the special functions or activities is accounted for under this item, such as; golf, fun run, tours, guest activities, etc.
155	Education/Training Registration fees for the conference workshop less any meal and refreshment costs, if included. Meals and refreshment cost are under item 130.
160	Scholarship/Fellowship This item would only be used if special income is earmarked for this purpose. This is not generally used.
165	Publications Not generally used, but if special publications are sold and the income is accounted for through the budget then this account would be used. If the funds received were paid out for these specific sales then they need to be accounted for under the expense ledger.

Example

Income Accounts

**Income
Account #**

Item

175	Contributions Any contributions solicited for special purposes, such as dinner wine for the banquet, should be accounted for under this item. At 1989 Fall Conference we collected contributions for San Francisco Earthquake Relief and this was included in this account.
180	Savings Account Interest All income earned on the conference bank account.
185	Other Income Use for any other item of income that will not fit under other accounts. The advance of funds from the Chapter could be accounted for under this item and a repayment to the Chapter would show in the expense ledger.

Example

Expense Accounts

Expense Account #	Item
400	Materials & Supplies Pre-registration and registration packet envelopes, tickets, special pins, badge holders, ribbons, signs, banners, film and developing, mailing labels, etc.
405	Printing & Processing Programs and registration material printing, special flyers, Newsletter costs if used specifically as conference advertising, exhibitor registration, workshop materials, etc.
410	Postage & Freight All postage and shipping costs related to conference mailing, advertisements, pre-registration, committee activities, etc.
415	Telephone All telephone costs related to Conference Committee. Sometimes the Local agencies may absorb some of these costs but the conference should budget for covering all conference expenses.
420	Secretarial Services Generally this is not required but if special services are required be sure to budget for it.
425	Bank Charges Costs for checks and monthly service charges. An interest bearing account will more than offset these costs. Maintain a balance to reduce the monthly service charges.
430	Meeting Room Rental Facility rental costs including special amenities that may be charged such as carpeting, table skirting, etc.
435	Meeting Meal Functions Actual costs to the conference for all food, beverages and refreshments provided including gratuity. Make sure that this will cover guaranty and complimentary meals.
440	Speaker/Entertainment Cost Any special costs related to speakers expenses or costs for entertainment. For cost of prizes see page 18. Generally, the policy is that we don't pay for technical session speakers but will provide meals and housing expense if it is necessary that they stay overnight.

Example

Expense Accounts

Expense Account #	Item
445	<p>Committee Cost</p> <p>Any special costs associated with the Conference Committee and with planning the conference. May include mileage cost or special travel for committee activities.</p>
455	<p>Education/Training Program</p> <p>Costs related to the conference workshop. If meals and refreshments are provided they should be accounted for under Meeting Meal Functions.</p>
465	<p>Publications</p> <p>Not generally used but if special publications for conference are provided then such costs as required for producing would be included. Sometimes conferences will print a booklet of papers on the various technical topics. This would be the item to cover such costs.</p>
470	<p>Awards</p> <p>Costs and contributions for all registration gifts and prizes, door prizes for technical sessions, special activity prizes, and any special gifts.</p>
475	<p>Special Functions</p> <p>Golf Green Fees or other fees for special functions. Transportation costs for tours, guest tours/program, etc.</p>
480	<p>Other Expenses</p> <p>Complimentary rooms for Chapter/National dignitaries, flowers or special decorations, special transportation, refunds for registration cancellations, etc.</p>
490	<p>Return Chapter Advance</p>

BUDGET TEMPLATE

The income information is based on expected registration and contributions. The expenses are obtained from the facility and from the committees that will be spending money.

To use approved software do the following:

Example of Conference Budget and actual financial report.

The next three pages provide an example for preparing the Conference Budget and the Actual Financial Report for the Conference. - This example follows the sample Quicken spreadsheet, Appendix Insert 30A.

These budgeted amounts can be entered into the accounting program.

OREGON CHAPTER APWA 19__ (FALL OR SPRING) CONFERENCE INCOME

Account No.	Item	Budget Amt.	Actual Amt.
125	Meeting Registration	\$8,555.00 ¹	\$7,493.00
130	Meal Ticket Sales	\$7,480.00 ²	\$11,350.50
135	Exhibit Space Income [\$150][35]=\$5250	\$5000.00 ³	\$5,000.00
150	Special Functions:	\$1000.00	\$746.84
	Golf Tourney	(\$500.00)**	(\$623.00)
	Fun Run	(\$200.00)**	(\$123.84)
	Guest	(\$300.00)**	(\$00.00)*
155	Education/Training	\$2,500.00	\$1,087.50
160	Scholarship/Fellowship	\$0.00	\$0.00
165	Publication	\$0.00	\$0.00
175	Contributions	\$1,000.00	\$497.00
180	Bank Account Interest Earned	\$50.00	\$87.00
185	Other Income		
	Advance from Chapter	\$2,500.00	\$2,500.00
	Misc. Income***		\$327.00
	TOTAL Income	\$28,085.00	\$29,589.24

Income calculations

- 1 Budget meeting registration computed as follows:
 - Delegates Early Registration (Prior to 10-2-89) [\$44][120]=\$5280
 - Delegates Registration (After 10-2-89) [\$71][25]=\$1725
 - Guest Early Registration (Prior to 10-2-89) [\$10][30]=\$300
 - Guest Registration (After 10-2-89) [\$20][10]=\$200
 - Other:
 - 3-Day Registration [\$70][10]=\$700
 - 1-Day Registration [\$30][10]=\$300

- 2 Budget for meal ticket sales computed as follows:
 - Wednesday Executive Committee Breakfast [\$8][20]=\$160
 - Thursday Breakfast(Past Presidents) [\$5][120]=\$600
 - Thursday Lunch [\$10][120]=\$1200
 - Thursday Banquet [\$18][150]=\$2700
 - Friday Breakfast, Chapter Meeting [\$9][120]=\$1080
 - Friday Lunch, Awards [\$12][120]=\$1440
 - Guest Luncheon, Thursday [\$10][30]=\$300

- 3 Budget for Exhibit space income computed as follows: [\$150][35]= \$5250.00

* This item included in Account No. 130

** Amounts shown in parenthesis are the sub-amount of this item for the special function activity.

*** Other miscellaneous income represents income received that is not accounted for in other account items.

SPECIAL BUDGET INFORMATION

1. In preparing the budget there should be estimated Net Conference Proceeds of \$3000 to \$4000.
2. The conference should provide complimentary registrations and accommodations for National APWA dignitaries and one guest each.
3. The conference should provide complementary registration and accommodations for the Chapter President and guest.
4. The conference typically furnishes meals for speakers on the day(s) they are speaking at the conference.
5. The conference may need to provide meals, registration, and accommodations for recipients of the scholarships. This should be coordinated with the scholarship committee.
6. Meals and basic registration may be provided for student members to encourage their attendance.
7. All retired active, life, and honoree members have their basic registration fee waived but must pay for meals and other special activities. (Suggest considering a reduced meal rate for these people)
8. Exhibitor registration does not include the conference registration.

**OREGON CHAPTER APWA
19__ (FALL OR SPRING) CONFERENCE
EXPENSES**

Account No.	Item	Budget Amt.	Actual Amt.
400	Materials and Supplies	\$1,500.00	\$1,274.83
405	Printing and Processing	\$1,000.00	\$1,1195.25
410	Postage and Freight	\$600.00	\$710.10
415	Telephone	\$150.00	\$345.46
420	Secretarial Services	\$0.00	\$0.00
425	Bank Charges	\$50.00	\$7.75
430	Meeting Room Rental (incl. carpet)	\$600.00	\$400.00
435	Meeting Meal Functions	\$11,000.00	\$11,000.00
440	Speaker/Entertainment Cost	\$1,000.00	\$300.00
445	Committee Costs	\$100.00	\$100.00
455	Education/Training	\$2,000.00	\$667.98
465	Publication	\$0.00	\$0.00
470	Awards and Prizes	\$2,100.00	\$1,821.04
471	Pre registration Gifts	(\$1000.00)	(\$1,821.04)
472	Door Prizes	(\$600.00)	(\$682.00)
473	Golf Prizes	(\$200.00)	(\$289.60)
474	Fun Run Prizes	(\$200.00)	(\$337.00)
475	Gifts for National. Pres. & Dir. Reg. IX	(\$100.00)	(\$139.97)
475	Special Functions	\$1,000.00	\$879.95
476	Golf	(\$400.00)	(\$315.00)
477	Guest Program	(\$300.00)	(\$414.95)
479	Other	(\$300.00)	(\$150.00)
480	Other Expenses	\$2,550.00	\$2,087.54
481	Complementary Rooms	(\$900.00)	(\$687.21)
482	Flowers	(\$300.00)	(\$393.37)
483	Transportation	(\$100.00)	(\$77.96)
484	Anniversary Calendars	(\$750.00)	(\$0.00)
485	Misc. and Refunds	(\$500.00)	(\$929.00)
490	Conference Advance Refund	\$2,500.00	
	Total Expenses	\$26,150.00	\$23,934.82
	Net Proceeds (Income Less Expenses)	\$1,935.00	\$5,654.42

These budgeted expense amounts should be placed into the accounting program. At the conclusion of the conference the actual amounts from the accounting program should be transferred to this spread sheet.

		Oregon Chapter APWA 1997 Spring Conference		Revised 05/08/97	
		Income			
Act. #	Item	Budget	Actual		
125	Conference Registration	\$20,747.00	\$23,590.00		
130	Meal Ticket Sales	\$2,300.00	\$1,505.00		
135	Exhibit Space Income	\$6,500.00	\$5,920.00		
140	Teleconference Registration	\$1,350.00	\$1,530.00		
151	Golf Tournament	\$1,050.00	\$900.00		
152	Fun Run/Walk/Bike	\$0.00	\$0.00		
155	Education/Training/Workshop	\$0.00	\$2,345.00		
160	Scholarship/Fellowship	\$0.00	\$0.00		
165	Publications	\$0.00	\$0.00		
175	Contributions - Education Founda	\$0.00	\$491.10		
180	Bank Account Interest Earned	\$10.00	\$63.26		
185	Other Income				
	Advance from Chapter	\$2,000.00	\$2,000.00		
	Total Income	\$33,957.00	\$35,999.36		
		Expenses			
400	Materials and Supplies	\$1,813.50	\$2,431.75		
405	Printing and Processing	\$2,071.00	\$1,689.68		
410	Postage and Freight	\$327.00	\$443.01		
415	Telephone	\$0.00	\$0.00		
420	Secretarial Services	\$0.00	\$0.00		
425	Bank Charges	\$24.00	\$0.00		
430	Meeting Room Rental	\$0.00	\$0.00		
435	Meeting Meals	\$11,270.70	\$13,918.04		
440	Speakers/Pre-Conference Works	\$430.00	\$0.00		
445	Committee Cost	\$0.00	\$0.00		
455	Education/Training	\$210.00	\$0.00		
470	Awards & Prizes	\$980.00	\$0.00		
475	Special Functions				
	Golf, Entertainment & Transpor	\$1,680.00	\$1,680.00		
480	Other Expenses				
	Decorations, Miscellaneous	\$400.00	\$168.64		
481	Complimentary Rooms	\$720.00	\$283.92		
490	Conference Refund	\$3,000.00	\$3,000.00		
	Total Expenses	\$22,926.20	\$23,615.04		
	Net Proceeds	\$11,030.80	\$12,384.32		

Income Calculations							
Acct. #	Item	Quantity	Price	Amount Budgeted	Actual Quantity	Actual Price	Actual Amount
	Registration						
125	Delegate Early Registration	105	\$155.00	\$16,275.00	95	155.00	\$14,725.00
125	Delegate Late Registration	8	\$175.00	\$1,400.00	25	175.00	\$4,375.00
125	Guest Registration	20	\$30.00	\$600.00	9	30.00	\$270.00
125	Basic Registration 1-day	10	\$75.00	\$750.00	25	75.00	\$1,875.00
125	Workshop Registration	50	\$35.00	\$1,750.00	67	35.00	\$2,345.00
	Total for Account #125	143		\$20,775.00			\$23,590.00
	Meal Ticket Sales						
130	Thursday Lunch	15	\$20.00	\$300.00	20	20.00	\$400.00
130	Thursday Banquet	35	\$25.00	\$875.00	22	25.00	\$550.00
130	Friday Chapter Breakfast		\$15.00	\$0.00	1	15.00	\$15.00
130	Friday Awards Lunch	15	\$20.00	\$300.00	27	20.00	\$540.00
	Total for Account #130	65		\$1,475.00			\$1,505.00
135	Exhibitor Space	32	\$175.00	\$5,600.00	32	185.00	\$5,920.00
151	Golf Tournament Fees	30	\$30.00	\$900.00	30	30.00	\$900.00
152	Fun Run (Bike Rentals)	0	\$8.00	\$0.00			\$0.00
155	Workshop Registration	50	\$35.00	\$1,750.00	67	35.00	\$2,345.00
175	Contributions (for Workshop)	2	\$49.00	\$98.00			\$0.00
	Woodward-Clyde Sponsored Sc	60	\$11.60	\$696.00	1	491.10	\$491.10
	Total for Account #175			\$794.00			\$491.10
180	Bank Account Interest Earned	4	2	\$8.00	1	\$63.26	\$63.26
185	Advance from Chapter			\$2,000.00			\$2,000.00
	Total Income			\$33,302.00			\$34,469.36
							Page 2

Acct. #	Item	Quantity	Price	Amount Budgeted	Actual Quantity	Actual Price	Actual Amount
440	Speaker Costs						
	A/V Technical Sessions						
	Workshop A/V						
	Workshop Miscellaneous (name	1	\$150.00	\$150.00	1	0	0.00
	Workshop Speaker Hotel	2	\$140.00	\$280.00	2	0	0.00
	Total for Account #440			\$430.00			\$0.00
445	Committee Cost			\$0.00			
455	Education/Training Program						
	CEU Certificates	30	\$7.00	\$210.00	8	0	\$0.00
470	Awards & Prizes						
	Door Prizes	20	\$20.00	\$400.00	0	24.99	0.00
	Golf Prizes	1	\$90.00	\$90.00	0	24.66	0.00
	Other Prizes			\$490.00	0	18.95	0.00
	Total for Account #470			\$980.00			\$0.00
475	Special Functions						
	Golf Fees	48	\$35.00	\$1,680.00	48	\$35.00	\$1,680.00
	Total for Account #475			\$1,680.00			\$1,680.00
480	Other Expenses						
	Banquet Decorations	1	\$400.00	\$400.00	1	168.64	168.64
	Registration Refunds			\$0.00	0	0.00	0.00
	Miscellaneous	0	\$300.00	\$0.00			0.00
	Total for Account #480			\$400.00			\$168.64
481	Complimentary Rooms						
	Scholarship Students - room 1	2	100	200.00	2	97.46	194.92
	Scholarship Students-room 2	1	\$100.00	100.00	1	\$89.00	89.00
	Chapter President & Guest	2	\$100.00	\$200.00	2	\$89.00	n/c
	National Dignitaries	1	\$220.00	\$220.00	0	89.00	0.00
	Total for Account #481			\$720.00			\$283.92
490	Conference Advance Returned t	1	\$3,000.00	\$3,000.00	1	3,000.00	\$3,000.00
TOTAL EXPENSES				\$22,926.20			\$23,615.04
							Page 4

Registration Price							
	Delegate - Early - Full		\$195.00				
	Delegate Full Meals		\$82.05				
	Difference		\$112.95				
	Delegate - Late - Full		\$205.00				
	Delegate Full Meals		\$82.05				
	Difference		\$122.95				
	Guest		\$35.00				
	Guest Hospitality Breakfast		\$20.06				
	Difference		\$14.94				
	Workshop Participant		\$45.00				
	Workshop Meal & Breaks		\$12.77				
	Difference		\$32.23				
Workshop Cost							
			Budgeted			Actual	
	Income	Quantity	Price	Amount	Quantity	Price	Amount
155	Registration Fee	40	\$45.00	\$1,800.00	34	\$45.00	1,530.00
	Total Workshop Income			\$1,800.00			\$1,530.00
Expenses							
435	Teleconference Refreshments	40	\$10.03	\$401.20	31	\$10.03	\$310.93
435	Coffee (4 gallons)				1	\$84.96	\$84.96
440	Satellite dish rental	1	\$500.00	\$500.00	1	\$275.00	275.00
440	APWA videoconference fee	1	\$595.00	\$595.00	1	\$447.50	447.50
440	A/V equipment rental	1			1	\$255.00	255.00
455	Certificates (CEU's)	15	\$6.00	\$90.00			0.00
455	Miscellaneous						
	notebooks	40	\$3.00	\$120.00	37	3.4	125.80
	brochures (printing & folding)				80	0.34	27.20
	Total Workshop Expenses			\$1,706.20			\$1,499.19
Details of Prizes & Gifts							
	Door Prizes	26	\$15.00	\$390.00	26	15.00	390.00
	Golf Prizes	1	\$0.00	\$0.00	13	20.00	260.00
	Speaker gifts	32	\$15.00	\$480.00	32	\$15.00	\$480.00
	Registration gifts	225	\$6.00	\$1,350.00	225	\$6.00	\$1,350.00
	A Delegate Grand Prize	1	\$100.00	\$100.00	1	\$100.00	\$100.00
	B Guest Grand Prize	1	\$50.00	\$50.00	1	\$50.00	\$50.00
	C Chapter Breakfast Prize (Gra	1	\$50.00	\$50.00	1	\$50.00	\$50.00
	D Awards Luncheon Prize	12	\$20.00	\$240.00	12	\$20.00	\$240.00
	E Education Survey Prize	1	\$50.00	\$50.00	1	\$50.00	\$50.00
	F Fun Run Prize	3	\$0.00	\$0.00	3	\$0.00	\$0.00
	G Name badge prize	1	\$20.00	\$20.00	1	\$0.00	\$0.00
	Total Prizes			\$490.00			\$2,970.00
							Page 5

**INTRODUCTION OF
ON-LINE REGISTRATION,
CREDIT CARD PAYMENTS,
AND THE WEB PAGE**

Early in 2000 Stephanie Reid researched ways for the Chapter Conferences to receive credit card payments and register people over the internet and found that Event Solutions, Inc. (ESI) has all the necessary components and expertise. APWA uses ESI's credit card service and on-line registration to save time, money, and hassles. This service is available for all Conference Coordinators.

ESI designs on-line registration forms, provides a secure internet site for credit card payments, and links to the Oregon Chapter web site. People register at www.oregonapwa.org, however, behind the scenes the registration is electronically sent to ESI's secure internet site. ESI processes the credit card payment and faxes the registration to APWA. All credit card payments that APWA receives via mail or fax are also sent to ESI for processing. This has worked out quite well for the Chapter.

ESI fee of \$4.25/transaction covers the following:

- Receive VISA and Mastercard payments (*via fax, phone, mail, internet*)
- Deposits payments into credit card bank account
- Process transaction and mail receipt to registrant (*incl. envelope, label, and postage*)
- Enter transaction into computer file
- Calculate processing fees and balance account (*about 30 days after the conference to allow time for ESI to receive the bank statement*)
- Write a check to APWA, less the processing fees

The Oregon Chapter of APWA approved and funded an initial investment to set up the internet registration page for the Chapter Conference held on April 4-6, 2000. It takes approximately four to six hours to set up a new internet registration form. I believe the plan was for subsequent conferences to use the same basic registration format, make minor changes, and pay a small fee for ESI to revise the previously designed internet registration form. It should take ESI only a couple of hours to revise the registration page when the basic conference registration format remains the same. Naturally, when the registration page format is changed or frequent revisions are made in the design process, it takes more time and money to complete the page.

When the conference flyer is ready to go to the printer, we please send a copy to ESI. This gives ESI adequate time to have an on-line registration form on the APWA web site at the same time the flyers are received by the target audience.

Judy Arasmith
Chapter Office • Phone 541-926-0044

FEES FOR SERVICES
PROVIDED BY
EVENT SOLUTIONS, INC.

Credit Card Processing and On-line Registration Fees

Bank fee	\$0.85/transaction
Bank fee	3%/sale (Visa and Mastercard) <i>Subject to bank fee increase</i>
ESI fee	\$4.25/transaction
Secure site fee for on-line registration	\$365/year paid by the OC-APWA Education Account
Design on-line registration form	\$42/hr. (<i>estimate two hours/event</i>)

Estimate two hours when the conference registration format remains the same.

- Revise the registration page
- Receive graphic design from Conference Chair
- Provide a secure site
- Link to the Chapter's web site

Important:

Send final draft of the flyer to ESI when you send it to the print shop. ESI needs to receive the flyer when it is "print-ready" so the on-line registration form is ready for people to register at the same time they receive the flyer in the mail.

2000 OREGON APWA FALL CONFERENCE REGISTRATION

Registration and Credit Card Payments also taken on-line: www.oregonapwa.org

Registration by mail

One person per form

Delegate _____ Organization _____
 Address _____ City, State, Zip _____
 Guest _____ Is this your first conference? q yes q no

Registration

q Full Registration (received by 9/22/00) \$195 \$ _____
 q Full Registration (received AFTER 9/22/00) \$210 \$ _____
 q Full Registration (non-member) \$210 \$ _____
 Do you wish a portion of the fee to be applied to membership? q yes q no
 Thursday ONLY Registration \$95 \$ _____
 Lifetime Members (meals not included) No Charge

**All Full Registrations include meetings, plus breakfast, lunch, and dinner on Thursday, business breakfast and awards luncheon on Friday. Lodging, activities, and pre-conference workshop are NOT included.*

Activities and Extra Meal Tickets

Thursday Breakfast \$15 x _____ \$ _____
 Thursday Luncheon \$20 x _____ \$ _____
 Thursday Dinner \$25 x _____ \$ _____
 Friday Business Breakfast \$15 x _____ \$ _____
 Friday Awards Luncheon \$20 x _____ \$ _____
 Guest Program Registration \$40 x _____ \$ _____
 Golf Tournament \$40 x _____ \$ _____
 Pre-conference Workshop \$25 x _____ \$ _____
 Technical Tour- *Medford's award winning wastewater treatment facility* No Charge
 Tennis No Charge

Mail Checks to: **Payable to OC-APWA Fall Conference** **Total Enclosed** \$ _____

OR-APWA 2000 Fall Conference
 Michelle Combs
 City of Medford, Room 204
 411 W. 8th Street, Medford, OR 97501
 Phone 541-000-9999 Fax 541-111-1234

*Full refunds before Sept. 22, 2000.
 AFTER Sept. 22, 2000, a \$50
 cancellation fee will be assessed.*

Meal Preference

Thursday Luncheon ----- Delegate:	q Sirloin tip	q Ravioli	
Extra Meal:	q Sirloin tip	q Ravioli	
Thursday Banquet ----- Delegate:	q Prime Rib	q Salmon	q Pasta
Extra Meal:	q Prime Rib	q Salmon	q Pasta
Friday Luncheon ----- Delegate:	q Chicken	q Pasta	
Extra Meal:	q Chicken	q Pasta	

Payment by q Visa, q Master Card

Credit Card Number _____

Expiration Date _____ Card Holder's Name _____

EXAMPLE OF ON-LINE REGISTRATION FORM

Oregon
APWA 2000 Fall Conference

/Sheets: 63/graphics/color/logo.g

October 11-13, 2000

Windsor Inn - Ashland Hills
2525 Ashland Street
Ashland, OR 97520

For Lodging Reservations:
800.547.4747

*Identify yourself with APWA
to receive conference rates*

OC-APWA 2000 Fall Conference Registration Form

Delegate Title

Organization

Mailing Address

City State Zip

Phone Guest

Registration (please check the appropriate boxes)

Technical Tour - Medford's Award Winning Wastewater Treatment Facility - No Cost
No Amending

Plink Plunge Design Workshop Registration (meals not included) \$25

APWA Fall Registration - Received by 9/23/00 \$195

APWA Fall Registration - Received after 9/22/00 \$210

APWA Fall Registration - Non-Member \$210

Fall Registrations above do include all meals. They do not include lodging, activities, or workshop.

Thursday Only Registration (meals not included) \$95

Lifetime or Period Members (meals not included) No Cost

DD-DI Engineering Scholarship Recipients (includes meals, lodging, and workshop) No Cost

Guest Registration (includes continental breakfast Thursday & Friday, and lunch on Thursday) \$40

Registration Total: \$

Meals (please check the appropriate boxes)

Full and Engineering Scholarship Registrations include all meals - please complete only the meal preference box below. Appropriate meal boxes must be checked for all other registrations, including guest registrations.

Thursday Luncheon Preference:	Delegate:	<input type="checkbox"/> Sirloin Tip	<input type="checkbox"/> Charleston Meatloam Entrée
	Extra Meal:	<input type="checkbox"/> Sirloin Tip	<input type="checkbox"/> Charleston Meatloam Entrée
Thursday Banquet Preference:	Delegate:	<input type="checkbox"/> Prime Rib	<input type="checkbox"/> Pasta Primavera
	Extra Meal:	<input type="checkbox"/> Prime Rib	<input type="checkbox"/> Pasta Primavera
Friday Luncheon Preference:	Delegate:	<input type="checkbox"/> Chicken Cordon Bleu	<input type="checkbox"/> Mediterranean Pasta
	Extra Meal:	<input type="checkbox"/> Chicken Cordon Bleu	<input type="checkbox"/> Mediterranean Pasta

Thursday Committee Breakfast

Delegate Extra \$15 x = \$

Thursday Luncheon and Keynote Speaker

Delegate Extra \$20 x = \$

Thursday Conference Banquet

Delegate Extra \$25 x = \$

Friday Business Breakfast

Delegate Extra \$15 x = \$

Friday Awards Luncheon

Delegate Extra \$20 x = \$

Meal Total: \$

Activities (please check the appropriate boxes)

Golf Tournament

No. Playing: \$40 x = \$

Preferred Golf Partner(s):

Tennis - Contact: Chris Appal, ph: 803-676-6202, or e-mail: appal@bamrock.net

No. Playing:

Activities Total: \$

TOTAL COST: \$

Payment Options

Submit this registration form by internet only if you are paying with a credit card.
For check or money order payments, print form and send with payment. See details below.

Check # Money Order

Check Amt \$ Money Order Amt \$

Credit Card VISA MasterCard

Name on Card Card #

Expiration Date Amount \$

Credit Card VISA MasterCard

Name on Card Card #

Expiration Date Amount \$

TOTAL PAYMENT SUBMITTED: \$

IF PAYING WITH CHECK OR MONEY ORDER:
Print out completed form and send with payment to:

Oregon APWA 2000 Fall Conference
Attn: Michelle Combs
City of Medford, Engineering Division
411 W 8th
Medford, OR 97501

Refund Information

A full refund will be given if cancellation is made before September 22, 2000.
After September 22, 2000, a \$50 cancellation charge will be assessed.

Registration Questions?

For More Information: [Michelle Combs](#) 541.774.2100
APWA Fall 2000 Conference Hotline: 541.488.5347

To send your registration, press this button:

MONTHLY REPORT FORM

OREGON CHAPTER APWA COMMITTEE REPORT

Spring/Fall Conference:

Committee:

By:

Date:

(Please limit to one page, double spaced)

The monthly committee report needs to be only a short narrative of the current activities, the relationship of activities to scheduled time lines or PERT chart, and identification of major problems that may need Steering Committee or Executive Committee action or approval, etc.

Essentially, the Conference is the responsibility of the Local Conference Committee and the Conference Program Committee. Details that can be handled by these individual committees need not be brought forward for approval.

EXAMPLE OF FINAL CONFERENCE REPORT

From Local Conference Chair

The following provides a listing of the information that should be included in the Final conference Report. The intent of the report is to provide information that will assist in future conference planning.

- Listing of Conference Committee with special acknowledgments for those making special efforts and for others who assisted in the conference.
- Narrative Report
 - General overview of conference and conference highlights
 - Recap of schedule and how the schedule was kept. Also identify scheduling problems.
 - Registration information
 - Special activity particulars
 - Identify special amenities provided by conference
- Financial Report (see examples included in the appendix)
 - Copy of Quicken account balances and transaction report.
- Registration, attendance, meals & housing report
 - Delegates - full registration, three-day, one-day
 - Guest
 - Conference workshop
- Technical Sessions
 - Exhibitors
 - Special activities
- Meal functions - Provide information on tickets sold, guarantees made, and actual served. Based on experience guaranties usually are about 85 - 90 percent of tickets sold. No shows usually represent 10 - 15 percent. Best to be slightly under. Catering will usually provide for 5 - 10 % overrun.
- Housing - Try to get a fairly accurate idea of actual rooms/facilities utilized whether at Conference facility or other. Get this information at registration desk when packets are picked up.
- Summary of the Conference evaluation forms
- Summary of Conference debriefing
- Addendum
 - Conference photographs

- Pre-registration packet material
 - Preliminary program
 - Registration form
 - Guest program flyer
 - Conference workshop flyer
 - Complimentary registration flyer
 - Housing information
 - Registration packets
- Receipt
- Final Conference program
- Tickets
- Registration listing

It is important to realize that this information becomes very valuable logistical material and is extremely important for use by future conference committees. Final report should be provided to Executive Committee, Steering Committee and to next Conference Chairs.

Quantity

BADGE HOLDER — 33¢ EACH

- Size 2.5" x 4", deluxe vinyl, top loading, elastic neck cord style

PAPER INSERTS — 22¢/SHEET OF 8 INSERTS

- Size 2.5" x 4" paper insert, eight per 8.5" x 11" page, laser and ink jet compatible
- Color choices q white q ivory q gray q tan

HORIZONTAL RIBBONS — 38¢ EACH • 4" x 1 5/8", adhesive top, gold foil imprint

Stock Title	Color	Quantity	Stock Title	Color	Quantity
Speaker	Royal Blue	_____	Past President.....	White	_____
Exhibitor	Purple	_____	Chapter President.....	White	_____
Committee.....	Maroon	_____	President Elect	White	_____
Committee.....	Royal Blue	_____	National Board.....	White	_____
Registrar	Black	_____	National Board.....	Black	_____
Moderator.....	Teal	_____	Board Member	Black	_____
First Timer.....	Goldenrod	_____	Regional Director.....	Black	_____
Guest	Teal	_____	Conference Committee..	Maroon	_____
Host.....	Maroon	_____	Conference Chairman....	Maroon	_____

VERTICAL RIBBONS — 44¢ EACH • 1 5/8" or 2" x 6 1/4", adhesive top, gold foil imprint

Stock Title	Color	Quantity	Stock Title	Color	Quantity
Honored Guest ...	Black	_____	Moderator. .	Green, Orange, Brown	_____
National Officer..	Black	_____	President.....	Royal Blue	_____
National President .	Black	_____	President Elect	Royal Blue	_____
National Vice Pres..	Red	_____	Immediate Past Pres. .	Red	_____
Chapter Officer ...	Royal Blue	_____	Vice President	Royal Blue	_____
Exhibitor	Goldenrod	_____	First Conference	Goldenrod	_____
Delegate	Green	_____	Keynote Speaker.....	Purple	_____
Moderator.....	Purple	_____ (2" x 8")			

INVOICE _____ **Employer** _____

Address _____

Phone _____ **City State Zip** _____

SHIP TO _____ **Employer** _____

Address _____

City State Zip _____

Phone _____ **Fax** _____

DATE OF ORDER _____ **DATE MERCHANDISE REQUIRED** _____

April, 2001

Items in stock can be shipped within 24 hours, Mon.-Fri. • We prepay shipping and add it to invoice.
FAX YOUR ORDER TO ESI: 541.926.3478 • SORRY, NO RETURNS FOR REFUND


SIGNS AND PRINTED MATERIAL


CHECK LIST


Item	Lead Person	Date Due	Production Method	Distribution	Notes
Name Tags					
CEU Forms ,(available at session rooms)					
Evaluations (for packets)					
Menu ,(for packets)					
Golden Knuckle, (for packets)					
Certificate					
Fact Sheet (include text and photo)					
Exhibitor (Check-off form for attendees' packets)					
Meal Tickets ,(different colors for each meal)					
Door Signs, (listing the sessions in each room)					
Banners					
(Two cloth banners were made for the 1993 conference.)					
Check with facility about mounting them on the wall.					
Bulletin Boards and easels					
(one in registration area for conference notes and job opportunities					
and one for Membership Committee display)					
Exhibitor Listing,(enlarge and hang on wall)					
Wine Donations, (table-top cards at banquet)					
Directional Signs ,(as needed)					
Welcome and Registration Hours (table top for registration desk)					
Table top sign, "Donate Unused Meal Tickets Here" (small sign to encourage donation of					
unused meals tickets for students, guests, or other people)					
Guest Room Sign, (for door or wall)					
APWA Board Meetings Sign, (for door or wall)					
Welcome to "City Sign" (for table top and include maps, local business brochures, etc.)					
Scholastic Foundation Display, (half of 6' table)					
Membership Committee Display, (half of 6' table)					
National APWA Display, (half of 6' table)					
One-Call Display, (self-contained, full table display)					
Emergency Management Display, (Lou Brunneau, City of Portland)					
Storm Water Education					
Technology Display					

Historical Photo Display (framed and mounted photos)


MEAL TICKETS EXAMPLES


 **THURSDAY BREAKFAST
ROUND TABLE**
Date: October 7, 1999
Time: 7:30 - 8:30 am
Present ticket to receive meal.

 **THURSDAY LUNCHEON**
Date: October 7, 1999
Time: 12:00 - 1:30 pm
Present ticket to receive meal.

 **THURSDAY EVENING
SALMON DINNER**
Date: October 7, 1999
Time: 7:30 pm
Present ticket to receive meal.

 **THURSDAY EVENING
PRIME RIB DINNER**
Date: October 7, 1999
Time: 7:30 pm
Present ticket to receive meal.

 **THURSDAY EVENING
VEGETARIAN DINNER**
Date: October 7, 1999
Time: 7:30 pm
Present ticket to receive meal.

 **FRIDAY BUSINESS
BREAKFAST**
Date: October 8, 1999
Time: 7:30 - 9:30 am
Present ticket to receive meal.

 **FRIDAY AWARDS
LUNCHEON**
Date: October 8, 1999
Time: 12:00 - 1:30 pm
Present ticket to receive meal.

PROVIDED BY EVENT SOLUTIONS, INC.

PHONE: 541-928-5055

EXAMPLE OF AUDIO/VISUAL EQUIPMENT NEEDS LIST

- Projection screens in each room
- Explore the ability to hook up VCR to Data Projector
(*eliminates TVs and projects a larger picture*)
- Include four power strips w/surge protectors for technical display area in lobby

Thursday	Room Name		
7:00-8:45 Breakfast Panel	Slide & Overhead Projectors Easel, pad, & pens		
9:00-9:30 Keynote	No audio/visual equipment		
	Room #1	Room #2	Room #3
9:45-10:30 Session 1	Slide Projector Overhead Projector	Data Projector for Power Point	Overhead Projector
11:00-12:45 Session 2	Slide Projector	None	Overhead Projector
	Room Name		
12:00-1:30 Lunch	Slide Projector & Laser Pointer		
	Room #1	Room #2	Room #3
1:45 - 2:30 Session 3	Slide Projector Easel, pad, & pens	Overhead Projector Easel, pad, & pens	Data Projector for Power Point
3:00-3:45 Session 4	Slide Projector	Overhead Projector	None
4:00-4:45 Session 5	Slide Projector	Easel, pad, & pens	Overhead Projector
7:00-9:30 Banquet	No audio/visual equipment		
	Room #1	Room #2	Room #3
9:45-10:30 Session 6	Slide Projector	Overhead Projector	Data Projector for Power Point
10:45-11:30 Session 7	Slide Projector Overhead Projector	Slide Projector	Overhead Projector
	Room Name		
12:00-1:30 Lunch	No audio/visual equipment		

**Portland, Oregon
April 5-7, 2000**

Conference Evaluation

To assist us with future conferences, please provide us your comments. Feel free to expand on any of the following questions or to comment on other matters.

- 1) How did the technical sessions meet your needs?

- 2) What subjects (and speakers) would you like to at future workshops or technical sessions?

- 3) What did you like most about this conference?

- 4) What would you like to see different at the next conference?

5) Please rate the following on a scale of 1 - 5 (1 = poor, 5 = great)

- | | | | | | |
|-----|--------------------|-----|----------|-----|---------------|
| ___ | Notification | ___ | Meals | ___ | Banquet/Play |
| ___ | Registration | ___ | Exhibits | ___ | Golf |
| ___ | Technical Sessions | ___ | Awards | ___ | Guest Program |
| ___ | Other: | | | | |

How would you improve any of the above: _____

- 6) Did you register for this conference on-line? (Yes (No
- If yes, what did you think about this new service? _____

Prize Drawing: Hand in completed evaluation form at the registration table Friday morning to get a ticket for the prize drawing to be given away at the Friday Awards Luncheon.

EXAMPLES OF PAST SCHEDULES

Activity	Spring 2000	Fall 1999	Spring 1999
Golf	Day 1 9 - 4:30 p.m.	Day 1 11 - 5 pm	Day 1 11 - 5 pm
Fun Run/Walk	Day 2 5:00 - 6 pm	Day 2 5 pm	Day 2 5 pm
Chapter Breakfast	Day 3 7:30 - 9:30 am	Day 3 7:30 - 9:30 am	Day 3 7:30 - 9:30 am
Committee Breakfast	Day 2 7:30 - 8:30 am	Day 2 7:30 - 8:30 am	Day 2 7:30 - 8:30 am
Awards Luncheon	Day 3 Noon - 1:30 pm	Day 3 Noon - 1:30 pm	Day 3 Noon - 1:30 pm
Exhibitor-hosted Social	Day 1 6:00 - 8:00 pm	Day 1 6:00 - 8:00 pm	Day 1 6:30 - 8 :30 pm

**2000 SPRING CONFERENCE
PORTLAND, OREGON
APRIL 5-7, 2000**

EXHIBITOR PRIZE DRAWING SIGNATURE FORM

Complete box below (please print clearly), get initials from 80% of the exhibitors (at least 31), and return form to the registration table.

Drawing will be Friday, April 7th at the Awards Luncheon. *Must be present to win!!*

Name: _____ **Agency:** _____

3M Corporation	_____	Special Asphalt Products	_____
ABT Interceptor	_____	Storm Water Management	_____
Agri Tech Inc of Oregon	_____	Talon, Inc	_____
Applied Professional Services	_____	Traffic Safety Supply Co.	_____
Blue Star Specialty Products	_____	Tt/CMI	_____
Cantel Corporation	_____	Universal Field Services	_____

CDS Technologies	_____	Other: _____
CSR Hydro Conduit	_____	Other: _____
David Evans & Associates	_____	Other: _____
Familian Industrial Plastics	_____	Other: _____

General Equipment Company _____

Hancor, Inc _____

Hilfiker Retaining Walls _____

Hobbs & Hopkins _____

HWA Geo Sciences _____

Inland Foundry Co _____

Inside Oregon Enterprises _____

Insituform Technologies _____

Magna Drive Corporation _____

Marquess & Associates _____

Municipal Supply of Oregon _____

NW Truckstell _____

Oregon Cooperative Purchasing _____

OTAK _____

Pacific Utility Supply _____

The Plank Company _____

Portland Precision _____

Reid Middleton, Inc _____

APWA 2000 SPRING CONFERENCE
DOUBLETREE LLOYD CENTER HOTEL - PORTLAND, OR
APRIL 5-7, 2000

SPEAKER AND SESSION EVALUATION

Your feedback provides important information to help plan future programs.

Speaker Name: _____

Session Title: _____

1) OVERALL SESSION RATING Consider content, organization and ultimate value

Excellent	Very Good	Good	Fair	Poor
5	4	3	2	1

2) SPEAKER RATING Consider knowledge and communication style

Excellent	Very Good	Good	Fair	Poor
5	4	3	2	1

3) What areas of the session were of greatest value to you?

4) What areas of the session were of least value to you?

5) Comments on session room and equipment:

6) Overall Comments:

Thank you for completing this evaluation.
Please turn the form into the moderator at the end of the session

APWA Chapter Conference Speaker Information Sheet

Title of Session __

Coordinator __

E-mail Address, Phone , Fax #'s _____

Type of Session (forum, speaker, panel) _____

Speaker __

Speaker's Background _____

Description of the session for program brochure: (Conference sessions are 45 minutes)

Audio Visual Equipment Requirement:

q 35mm slide projector

q Overhead projection

q Easel, pad, & pens

q Other

Thank you for your assistance.

EXAMPLE
REQUEST FOR DONATIONS
TO SUPPORT SCHOLARSHIPS

Date

Subject: Support for the APWA Chapter's Spring Conference

I am writing to enlist your support as a consultant member of the Oregon Chapter of American Public Works Association. Here is how you can help. Support would be made the form of contributions for dinner wine for the Thursday, Date banquet at the Spring/Fall Conference. A list of the firms contributing toward the wine purchases is prominently displayed on each banquet table. The semi-annual conferences generate income that is used to support student and member scholarships and our educational program.

I will truly appreciate whatever you can give, and I know these scholars will too. Your contribution helps pay for conference expenses, thus generating more income to provide support for APWA's various public works programs. If you would like to make a contribution, please make checks payable to "Oregon Chapter, APWA" and send them to: Name and Address. Please send checks so we receive them by Date. Contributions are normally in the \$30 to \$50 range. Any amount is most welcome.

It is people like you who truly make the world a better place to live. I hope to personally see you at the Spring/Fall Conference in Location on Date.

With kind regards,

Name and Signature
Conference Official

Other Comments:

If you are requesting wine donations from engineering firms, etc. send out a letter two months in advance. It's best to have someone else, other than the hosting organization, send the letter out.

A table top tent with names of contributors is put on tables the night of the banquet.

We recommend a follow-up thank you letter after the conference is over.

AN OVERVIEW FOR SPONSORS REQUESTING CEUS

- CEUs may be awarded where ESAC approved procedures are used and the educational program meets national CEU criteria.
- One CEU may be awarded for each 10 contact hours of instruction. (One tenth of a credit for one hour)
- The program sponsor must demonstrate that the program meets national criteria for CEUs including: 1) educational need, 2) learning outcome, 3) qualification of instructors, and 4) quality of course content.
- **PRIOR** to the educational program, the sponsor is responsible for submittal of the CEU Evaluation Request (see insert) and the instructor background information, topic and timeline of each presentation, and the \$45 evaluation fee for new classes.

For an educational program to be considered approved without special petition to the ESAC Committee, the submittal of request forms must be received at least 15 days before the course or event is scheduled. Send form to ESAC/ CEU Committee, 11480 SE Abby Lane, Clackamas OR 97015-8529, phone 503-698-9401.

- **DURING** the educational program, the sponsor is responsible for following ESAC approved procedures for monitoring class attendance. See insert for example of CEU form that goes to each attendee. It is important for attendees to get each session stamped or initialed by room monitor, etc. for CEU's to be granted. It is the responsibility of the attendee to get his/her form completed accordingly.
- **AFTER** the educational program, the sponsor is responsible for following ESAC approved procedures in: (1) assigning the actual CEUs earned by each participant, (2) submitting course records to ESAC (including participant roster and a sample certificate), and (3) issuing certificates or letters to participants signifying the date, course title, ESAC number, and CEUs earned.

CONFERENCE HOST PROCEDURES

AND

EVENT SOLUTIONS, INC. SERVICES

Conference Host applies for CEU approval from ESAC upon completion of the flyer.

Since the conference is a repeated event, basically without changes, no fee is charged by ESAC.

Host supplies Event Solutions, Inc. with a copy of ESAC's approval letter.

Host monitors class attendance and collects CEU forms from attendees.

After the conference, the host sends the attendee forms to ESI.

Event Solutions, Inc. provides the following post event CEU services at the rate of \$8/person.

1298 Elm Street SW, Albany, OR 97321, Phone 541-928-5055

- Calculate CEU's for each participant
- Enter of name, home address, SS#, CEU's into data base
- Print and mail CEU roster with pertinent information to ESAC
- Furnish blank certificates, design text, and print on laser printer
- Mail certificates to program chair for signatures
- Print mailing labels for each participant and furnish 9" x 12" envelopes
- Mail completed certificate to each participant at their home address
- ESI permanently holds CEU records as required by ESAC

OESAC Course Application Form

OESAC CEU Committee • 11480 Abby Lane • Clackamas, OR 97015
Phone: (503) 698-9401 • Fax: (503) 698-7144 • Email: info@oesac.com • Web: www.oesac.com

Course Title:
Instructor(s):
Location(s):
Date(s):

Requested CEUs:
(1 hour class time = .1 CEU – do not include time for breaks, lunch)

Do you want to be listed on the website as an available course (“Contact Sponsor”)?: Yes No
If you want to list newly scheduled classes from an already approved course, you must send in the new schedule

Course Format: Lecture Home Study Computer One Time Class
Recurring
Recurring Dates

Training Objective:

Target Audience:

Method of tracking attendance:

Course contact name:
Address:
City, State, Zip:
Course contact phone:
Course contact fax:
Course contact email:

Sponsor:
Address:
City, State, Zip:
Contact:
Sponsor phone:
Sponsor fax:
Sponsor email:

Enclosed: Instructor Biography Course Agenda Course Timeline Course Brochure
Check #
Amount Enclosed:

CEU APPLICATION FORM

Continuing education units will be granted for the Columbia Scenic Highway bus tour, Pipe Rehabilitation workshop, and program sessions.

0.5 CEUs are granted for FULL attendance

CEU credits are issued at 0.1 CEU per hour of classroom participation.

1. Hand this form to the session moderator at the start of each session.
2. Session moderator or speaker must initial the session attended.
3. Pick up form at the conclusion of each session.

Date	Technical	Management	Environmental
Wednesday April 5, 2000			
8:30 - 4:00 pm	Columbia Scenic Highway Bus Tour		
1:00 - 5:00 pm	Pipe Rehabilitation Workshop		
Thursday April 6, 2000			
9:45 - 10:30 am	Integrated Site Landscape Design for Stormwater Management	What Everyone Should Know About Estate Planning	How Stream Temperature Regulations Will Affect You
11:00 - 11:45 am	Skinny Streets - What Do You Need to Know?	Peer Review - Certification Programs	Preparing for Phase 2 - Stormwater Permitting
1:45 - 2:30 pm	Considerations for Concrete Pipe Design	Benchmarking Public Works Emergency Management Programs	ESA/4(d) Rules: How They May Affect Public Works Projects
2:45 - 3:30 pm	Pavement Management Panel - What Have We Learned?	Planning and Development of a Capital Improvement Program (CIP)	The 4(d) Rules and Environmental Permitting
4:00 - 4:45 pm	Mist Underground Gas Storage Project	Retaining Diversity - Panel Discussion	Portland's Stormwater Management Manual
Friday April 7, 2000			
9:45 - 10:30 am	Progress on the Historic Columbia River Highway State Trail	e-Bidding of Public Improvements	A Practical Approach to Sustainable Development
10:45 - 11:30 am	Advanced Traveler Information Systems - Public Agencies as Information Providers	Benchmarking Facility Performance: A Process for Identifying Comparable Costs and Best Practices	Meeting Erosion Control Requirements: Portland's Approach

- **Please Print** your name the way you want it to appear on your Certificate of Completion.
- Home address and social security number are required for CEU records.

Last Name _____ First Name _____

Employer _____

HOME Address _____

City _____ State _____ Zip _____

Social Security Number _____

Leave this form at the conference registration table upon completion

*or mail to: ESI, 1298 Elm Street SW, Albany, OR 97321,
no later than three days after the event*



FREQUENTLY ASKED QUESTIONS ABOUT CEUS

WHAT IS A CEU?

Continuing Education Units (CEUs) are a way of assigning learning credits for education or training that does not have college credit but provides the participant with advanced or post-high school training. One CEU is defined as ten contact hours of qualified instruction. Only programs which are a significant educational experience and for which a permanent record will be maintained would be awarded CEUs.

WHO USES CEUS?

The CEU record can provide a current or prospective employer with information about an individual's continuing education and training experiences. This document can also be used by registration and certification boards and occupational societies which require continuing education to maintain or increase professional competence as a requirement to renew a certificate.

Will all courses assigned CEUs satisfy professional growth requirements for my license or certification?

While many courses qualify for CEUs, not all subject matter are acceptable to specific professional licensing and certification programs and you should check with your licensing or certification program to ensure that a particular course will be acceptable.

WHAT IS ESAC AND HOW IS IT INVOLVED IN AWARDING CEUS?

The Environmental Services Advisory Council assists the Oregon Departments of Education, Energy, Environmental Quality, and the Oregon Health Division in environmental training coordination. The ESAC Continuing Education Committee evaluates programs and maintains records of courses presented in Oregon meeting CEU criteria in the area of environmental technology.

HOW ARE CEUS EVALUATED BY THE CEU COMMITTEE?

The sponsor of the educational program requests evaluation of a course for CEUs. The CEU committee chair uses the standards of the International Association for Continuing Education and Training (IACET) to determine if the program meets standards and determines the maximum number of CEUs to be awarded for full program attendance. The full committee reviews the determination and gives final approval.

WHO CAN AWARD CEUS?

Continuing Education Units may be awarded by a college, association, company, trainer, agency, or other organization provided they follow the standards.

HOW MANY CEUS CAN BE AWARDED FOR A PROGRAM?

One CEU can be awarded for each ten hours of general or technical instruction applicable to a position in the field of environmental technology. The CEU is designed so that each hour of instruction can be recognized. That is, 8 contact hours of instruction can be recorded as 0.8 CEUs. Only complete hours are considered in assigning CEUs. For example, 1.7 CEUs are assigned for a learning experience with a total of 17, 17.50 or 17.75 contact hours. Only actual instruction time is counted, not breaks, lunch, additional reading or study outside of the classroom.

WHO KEEPS RECORDS OF CEUS AWARDED?

The institution or organization sponsoring the program must keep permanent records of individual CEU awards in a format that can be accessed should a participant need documentation or records must be verified. ESAC maintains records of courses offered in Oregon and submitted for evaluation. Participants are responsible for their own CEU records.

AN OVERVIEW FOR SPONSORS REQUESTING CEU EVALUATION BY ESAC

CEUs may be awarded where ESAC-approved procedures are used and the education program meets national CEU criteria.

The program sponsor must demonstrate a program's educational need, learning outcome, course content and the qualification of instructors.

The sponsor or organizer of each program is responsible for selecting qualified instructors. Instructors must have specialized experience or be considered knowledgeable by their peers in the subject.

When submitting a course for evaluation by ESAC, the program sponsor should complete the Evaluation Request form and provide a course outline, detailed schedule, list of all instructor names, titles, employers, along with a brief description of their qualifying experience and the \$45 evaluation fee.

During the educational program, the sponsor is responsible for monitoring class attendance and course content.

After the educational program, the sponsor awards CEUs based on actual individual attendance. One CEU may be awarded for each ten hours of instruction rounded down to the nearest hour.

It is the responsibility of the sponsor to issue a certificate or letter to participants detailing the course title, date and CEUs earned. Permanent records must be maintained of CEUs earned by individuals.

To allow ESAC to evaluate the availability of training in various subjects and locations around the state, the sponsor is asked to submit a copy of the

participant roster or a summary of the number of attendees, CEUs awarded and the date and location of the training. This report can also serve as a backup to the sponsors records. It is not necessary to submit a course each time it is offered provided the content, schedule and instructors remain the same.

ACTIVITIES GENERALLY QUALIFYING FOR CEU AWARD

Short Schools	Are typically sponsored by professional organizations and are designed to provide a variety of technical information in a classroom setting to assist the attendee in acquiring competency in a specific area.
Workshops	Can be classroom, laboratory, shop, or field-based training experiences focusing on a single topic or subject. Competency testing is often included.
Training Programs	Frequently consist of extended instruction carried out in one or more sessions. These sessions may be classroom-based or a combination of formal presentation, laboratory or field experience in a structured environment.
Other	Programs that impart general or technical information which is applicable to the professional or technical fields and will be of value wherever an individual is employed are appropriate for awarding CEUs.
Conferences	Only organized courses, workshops or seminars held in conjunction with association meetings, conferences or conventions and following the administrative and program criteria qualify for CEUs

ACTIVITIES NOT QUALIFYING FOR CEUS

- Association and committee meetings or any other non-educational activities of organizations.
- Product Demonstrations, welcoming speeches, breaks, luncheons, receptions and other social activities.
- Orientation programs or training specific to the internal affairs of an organization or work site.
- Study, reading or other activities outside the classroom or meeting schedule
- Testing not designed to provide instruction and unsupervised study.
- Class instruction beyond the first presentation, writing or research on a paper or report.
- Partially completed educational experiences unless within a larger educational program where logical and complete individual topics do not rely on other topics in the program to convey information.



CATEGORIES AND DEFINITIONS FOR ESAC APPROVED CEUS

Health and Safety - Training which is intended to protect the health of the person being trained or their coworkers from work related safety hazards or to improve personal health. Typical courses would include: First Aid, Cave-In, Confined Space, chlorine handling, stress reduction.

General - Training for related skills need for optimal job performance and advancement. It would include: GIS mapping, Public Relations, communication, Total Quality Management, supervision, budgeting, writing, computers and math not specific to water or wastewater.

Environmental Hazards - courses on the production, generation or disposal of hazardous materials or courses intended to reduce harm to the public and the environment by control of natural or manmade hazards. It would include: Hazardous Substances Control, Remediation, Agricultural chemicals and pesticides, asbestos, infectious disease materials, air quality, on-site sewage disposal, food protection.

Water Treatment - courses intended to protect health by improving the production or treatment of drinking water for public consumption. Includes treatment to remove biological, chemical, physical and radiological contaminants, filtration, chemical feed, regulatory compliance and record keeping, sample collection and analysis or measurements.

Water Distribution - courses intended to protect health by improving the production and distribution of drinking water for public consumption. Includes: disinfectant residual maintenance, cross connection control, sample collection, distribution piping, analysis or measurements, regulatory compliance and record keeping.

Maintenance - courses intended to help ensure operability, reliability and full useful life of various mechanical, hydraulic, pneumatic and electrical equipment common to the environmental field. Topics would include maintenance management, records and inventory systems as well as technical training in preventive maintenance or repair/replacement of motors, valves, pumps,

packing/seals, electrical controls, flow instrumentation, standby power, protective coatings, lubricants, safety equipment.

Resource Management - courses relating to the use and protection of resources such as ground and surface water sources, solid waste and recycling, energy conservation, cogeneration.

Wastewater Treatment - courses on ensuring optimum effectiveness and efficiency of domestic wastewater treatment processes to include primary, secondary and advanced treatment, disinfection,, solids dewatering and digestion, biosolids(sludge) and effluent reuse. Topics would include wastewater mathematics, treatability and pretreatment, process control (physical, chemical and biological), process evaluation, troubleshooting and needs assessment, permit compliance, water quality monitoring and laboratory quality assurance, regulatory issues, reports and record keeping, emergency planning, surface and groundwater protection.

Wastewater Collection - training directly related to the operation, preventive maintenance, construction and rehabilitation of sanitary wastewater collection systems to include service connections, gravity/pressure lines and pump (lift) stations. Topic would include: system mapping, inspection, testing and cleaning, repair, flow monitoring, root, odor, grease and corrosion control, inflow identification and control, infiltration reduction, chemical usage, emergency response, record keeping , regulatory compliance, planning and design.

P A S T T H E M E S

DATE	THEME
Oct., 1989.....	Celebrating our 25th Anniversary with a Forward Vision
Oct., 1991.....	Putting the Public Back in Public Works
April, 1992.....	Times are Changing
Sept., 1992	APWA: Hear Ye! Hear Ye! Hear Ye!
May, 1993.....	Public Works The Next Generation: Boldly Going Where No Agency has Gone Before
Oct., 1993.....	Practical Applications for Today
April, 1994.....	Gearing up for Change
Oct., 1994.....	A Mountain of Knowledge Awaits You
May, 1995.....	Public Works is Risky Business
Oct., 1995.....	Climbing to New Heights
April, 1996.....	Shake, Rattle & Row
Oct., 1996.....	Public Works - "As You Like It"
April, 1997.....	Connecting People, Resources, Services
Oct., 1997.....	Rebuilding Bridges to the 21st Century
May, 1998.....	Explore the Possibilities
Oct., 1998.....	Public Works in the Real West
April, 1999	
Oct., 1999.....	Looking Back to the Future
April, 2000.....	New Ideas for a New Millennium
Oct., 2000.....	"Faster, Cheaper...Better?"
April, 2001.....	Bright Ideas in Public Works
Oct. , 2001.....	Keeping it Flowing with Public Works
March, 2002	Bridging the Columbia
October, 2002	Public Works in the Real West II, "Moovin' forward"
April, 2003.....	Confluences & Crossroads
October, 2003	Diverse Ideas in Public Works

CHAPTER CONFERENCE HISTORY

DATE	LOCATION	FACILITY
5/29/64	Pre-Chapter Organizational Meeting	
9/9-11/64	Bend	Bend Country Club
4/14-16/65	Eugene	Lane County Fairgrounds
9/19-21/65	Pendleton.....	Tapadera Motel
Spring 1966.....	No Conference held	
6/12-14/66	Portland - Western Public Works Conference	
10/12-14/66	Coos Bay.....	Coos Bay Courtel
3/29-31/67	Salem	Marion Motor Hotel
9/13-15/67	Astoria	SeaFair Restaurant & Astoria Library
3/27-29/68	Medford	City Hall & Courthouse
9/24-26/68	Portland.....	Cosmopolitan Motor Hotel
3/25-27/69	Corvallis	Benton Hotel
9/23-25/69	Bend.....	Pilot Butte Hotel
3/25-27/70	Portland - Joint Conference	
10/7-9-70.....	Newport	The Dunes Motor Hotel
5/5-7/71	Salem	Holiday Inn Motel
10/6-8/71	Klamath Falls	Klamath Falls Hotel
5/10-12/72	Eugene	Thunderbird Motor Inn
10/18-20/72	North Bend	Pony Village Motel
4/18-20/73	Bend.....	Sunriver Resort
10/24-26/73	Gleneden Beach.....	Salishan Resort
4/2-4/74	Vancouver - Joint Conference ...	Inn at the Quay
10/16-18/74	Medford	Holiday Inn Motor Inn
4/9-11/75	Warm Springs.....	Kah-nee-ta Resort
10/22-24/75	Gleneden Beach	Salishan Resort
4/28-30/76	Wemme.....	Bowman's Resort
10/13-15/76	Bend.....	Sunriver Resort
4/6-8/77	Otter Crest.....	Inn at Otter Crest
9/28-30/77	Cottage Grove	Village Green Inn
4/12-14/78	Pendleton.....	Indian Hills Motor Inn
9/22-24/79	Portland - National APWA Congress	
4/30--5/1/80	Ashland	Ashland Hill Inn
10/15-17/80	Baker.....	Sunriver Inn & Country Conf. Cent.
4/7-9/81	Vancouver - Joint Conference ...	Inn at the Quay
10/14-16/81	Lincoln City	Dunes Resort
4/14-16/82	Bend.....	Sunriver Resort
10/13-15/82	Umatilla.....	Nendall's Inn
4/13-15/83	Corvallis	LaSells Stewart Center & Nendell's
10/12-14/83	Astoria	Thunderbird Motor Lodge

DATE	LOCATION	FACILITY
April 11-13, 1984.....	Portland.....	Thunderbird, Jantzen Beach
Oct. 17-19, 1984.....	Eugene	Eugene Hilton Hotel
April 17-19, 1985.....	Bend.....	Inn At The Seventh Mountain
Oct. 9-11, 1985.....	Ashland	Ashland Hills Inn
May 21-23, 1986	Baker.....	Sunridge Inn & Country Conf. Cntr.
Oct. 22-24, 1986.....	Newport.....	Embarcadero
May 13-15, 1987	Eugene	Eugene Hilton Hotel
Oct. 14-16, 1987.....	Welches	Rippling River Resort
April 27-29, 1988.....	Ashland	Ashland Hills Inn
Oct. 5-7, 1988	Umatilla.....	Nendell's Inn
April, 12-14, 1989....	Vancouver - Joint Conference	Inn at the Quay
Oct. 18-20, 1989.....	Seaside	Seaside Convention Center
April 25-27, 1990.....	Bend.....	Sunriver Resort
Oct. 16-18, 1990.....	Corvallis	Nendell's Inn
April 24-26, 1991.....	Welches	Resort At The Mountain
Oct. 16-18, 1991.....	Beaverton	Greenwood Inn
Apr. 29- May 1 '92	Pendleton.....	Indian Hills Motor
Sept. 30-Oct. 2 '92...	Ashland	Ashland Hills Inn
May 5-7, 1993	Portland - Joint Conference	Red Lion Hotel, Jantzen Beach
Oct. 13-15, 1993.....	Newport.....	Newport Hotel
April 27-29, 1994.....	Eugene	Valley River Inn
Oct. 12-14, 1994.....	Bend.....	Inn of the 7th Mountain
May 10-12, 1995	Seaside	Conference Center
Oct. 18-20, 1995.....	Welches	Resort At The Mountain
April 24-26, 1996.....	Beaverton	Greenwood Inn
Oct. 16-18, 1996.....	Ashland	Ashland Hills Inn
April 16-18, 1997.....	Eugene	Valley River Inn
Oct. 21-24, 1997.....	Portland-Joint Conference	DoubleTree Hotel, Jantzen Beach
May 6-8, 1998	Seaside	Seaside Convention Center
Oct. 14-16, 1998.....	Pendleton.....	Pendleton Convention Center
April 28-30, 1999.....	Welches	The Resort at the Mountain Ted Kyle
Oct. 6-8, 1999	Florence.....	Florence Events Center Ken Lanfear
April 5-7, 2000	Portland.....	Doubletree, Lloyd Center Linda Dartsch
Oct. 11-13, 2000.....	Ashland	The Windmill Inn Bob Deuel

DATE	LOCATION	FACILITY
April 4-6, 2001	Bend	Sunriver Resort Mary Meloy & Becky Loyd Mike Elmore & Jim Carnahan
Oct. 3-5, 2001	Canyonville	Seven Feathers Chris Berquist & Nikki Johnson
March 26-29, 2002 ...	Stevenson, Washington	Skamania Lodge Terry Chamberlin
Oct. 8-11, 2002.....	Pendleton.....	Pendleton Convention Center Gerald Odman & Jutta Haliewicz
April 1-4, 2003	Eugene	Valley River Inn Mark Schoening & Paul Klope
Oct. 21-24, 2003.....	Warm Springs	Kah-Nee-Ta Resort Mary Meloy & Arlene Thomas

Golden Knuckle Award

"You pay to give it and not to get it!"

HISTORY: At the 1987 Spring Conference, Pat Napolitano, a past president (1985) presented to the then-President Hugh Kalani a big, rusty, “hunk of iron” which was actually a part of a train coupling mechanism that Pat had scrounged from the railroad yards near Hermiston. President Hugh embellished the award by adding steel wheels which came from the Canby Ferry and gearshift level and brake lever that were from an “antique” International truck. The Award was later named the “Golden Knuckle Award” and has been passed on to various Chapter members as shown below.

Each recipient has added his or her own embellishments. In 1993, Larry Rice, award recipient, requested that the Executive Board turn the award into a fundraiser for the Oregon APWA Education Foundation.

At the center of the fundraiser concept is “you pay to give it and not to get it!” There is a minimum contribution of \$5. You get “points” depending on the level of your contribution and apply the points to the name(s) of the person(s) you want to receive the award. The person with the most points at the end of the conference takes home the award. In the event of a tie, the immediate past recipient will make the winning determination.

Please complete ballot on reverse side

PAST RECIPIENTS		
DATE	RECIPIENT	EMBELLISHMENTS ADDED
Spring 1987	Hugh Kalani	Ferry trolley wheels, gear shift & brake lever
Fall 1987	Jeff Ballard	Seat
Spring 1988	Pat Napolitano	Tail light
Fall 1988	Bob Adams	Joggers light & APWA license plate
Fall 1989	Merle Langley	Horn
Spring 1990	Gene Appel	Food tray & water bottle
Fall 1990	Dave Vargas	Cellular phone & new corkscrew gearshift handle
Fall 1991	Bill Blum	Bigfoot gas pedal
Spring 1992	Danna Barnhart	Travel kit
Fall 1992	Gordon Wyatt	New rubber tires and wheels, umbrella & shades
Spring 1993	Brenda Brown	High-tech Global Positioning System (GPS)
Fall 1993	Larry Rice	Seat belt & Education Foundation Award Program
Fall 1994	Chris Bowles	Water meter and faucet
Spring 1995	Lori Faha	“Golden” storm drain stencil
Fall 1995	Jeanne Nyquist	Life vest & flashing light
Spring 1996	Dan Boss	40 black balloons
Fall 1996	Steve Baker	Mystery attachment
Spring 1997	Les Lyle	Weather Vane — “Winds of Change”
Fall 1997	Lance Burke	Dignity, integrity & class
Spring 1998	Paul Klope	Electric fan, metrification kit & umbrella lettering
Fall 1998	Jerry Odman	Cowboy safety boots
Spring 1999	Mike McKillip	Fishing net
Fall 1999	Mary Meloy	

Golden Knuckle Award

- Use the ballot to contribute five points toward your choice of recipient of the Oregon Chapter's Golden Knuckle Award. The five dollars will come out of your registration fee and will be donated to the Oregon APWA Education/Scholarship Endowment Fund.
- Also use the ballot to make additional tax-deductible donations and to add support for your candidate for the Golden Knuckle Award. All donations will be deposited in the Endowment Fund to be used for student and APWA member scholarships. The more dollars, the more points, and the award will be given to the person receiving the most points.

The Point System

<u>Contribution</u>	<u>Points</u>
\$5 to \$10	1 point per dollar
\$11 to \$20	2 points for each dollar over \$10
over \$20	3 points for each dollar over \$20

GOLDEN KNUCKLE AWARD BALLOT

I, _____

nominate (please circle appropriate name below) _____ to receive the prestigious GOLDEN KNUCKLE AWARD, and hereby cast _____ votes.

CANDIDATES:

- | | | |
|-------------------|--------------------|------------------|
| • Jerry Faye | • Linda Dartsch | • Ted Kyle |
| • Dave Haskell | • Terry Chamberlin | • Bruce Erickson |
| • Jim Blair | • Bob Deuel | • Jon Katin |
| • Lou Bruneau | • Ron Polvi | • Stephanie Reid |
| • Mike Soderquist | | |

Write-in candidate: _____

Turn this form in at the registration table.

Golden Knuckle Award Candidate

(posted at the conference)

First Name

Last Name

(place photo here)