



RTBI

NATIONAL CONFERENCE MANUAL

APRIL 2002.

NATIONAL CONFERENCE MANUAL

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SECTION 1

Brief Synopsis of National Conference

- 1.1) Who is responsible for the organisation of National Conference
- 1.2) Who pays the Bills
- 1.3) Is it possible to detail the exact requirements of a Conference

1.1) Who is responsible for the organisation of National Conference

The ultimate responsibility for National Conference rests with the National Conference Officer who answers to National Council & the National Executive. It is his duty to guide and encourage the Local Conference Committee throughout the long period of organisation and to identify the many pitfalls.

It must be remembered, however that this is a joint Round Table & Ladies Circle National Conference and it is important that Circlers are involved in the organisation of the Conference from the outset.

In practical terms the detailed task of organising the National Conference rests with the Local Conference Committee. The Local Conference Chairman reports directly to the National Conference Officer. The National Financial Controller & National Liaison Officer are members of the National Conference Committee and are appointed by the National Conference Officer to join the Executive of the Local Conference Committee. They are expected to attend all meetings of this executive and its committee.

The National Officer's function is to ensure that the Local Committee act in accordance with the best interests of RTBI as a whole and to ensure that the financial risk of organising Conference is minimised.

The local Committee consists of:

Executive

The Executive consists of Chairman, Vice Chairman, Secretary and Treasurer (who must be a qualified accountant). The Chairman and Treasurer must be active Tablers throughout the Table year ending 31st March immediately preceding their Conference. In addition it is prudent to include a representative from Ladies Circle on the Executive. Also the National Conference Officer, National Liaison Officer and the National Financial Controller sit on the Local Executive.

The National Conference Officer oversees the organisation of Conference.

The main function of the National Liaison Officer is to act as a link between the Local Committee and National Council. He should ensure that the Local Committee's arrangements do not conflict with National requirements.

The National Financial Controller ensures the local Treasurer keeps a strict financial control on the budgets and expenditure of Conference.

In addition the Ladies Circle Conference Convenor is a member of the RTBI National Conference Committee and of the Local Executive.

Local Committee

The local Convenors cover many different aspects of Conference and a list of Convenors, and details of their duties, is given in section 4.6

1.2) Who pays the Bills

The finances of Conference are underwritten by Round Table and any profit or loss accrues to the association. All budgets are closely scrutinised.

Income is obtained from four sources:

- 1) Registration and ticket sales;
- 2) Sponsorship in both cash and kind;
- 3) Contributions by both RTBI and NALC towards the cost of running their respective AGM's as detailed in section 6.3;
- 4) Profits from Conference sales.

The Local Committee are allowed a large amount of autonomy, but have to provide certain facilities for various National Standing Committees. (e.g. Sports & Social, Sales etc). The two National Representatives on the Local Committee can be invaluable in ensuring that harmonious relations are maintained.

1.3) Is it possible to detail the exact requirements of a Conference

No – it is not. Each Conference will acquire its own identity because of its local characteristics. However, experience has shown that a number of principles need to be maintained for a successful Conference, and this manual seeks to give an outline.

Contact with Tablers and Circlers who have organised a previous Conference will be found to be invaluable. Even more invaluable is to establish the principle of communication within the Committee at a very early stage. Everyone, especially the Chairman, should know exactly what is going on. An efficient system of distribution of Sub-Committee minutes and Convenors' reports is absolutely vital.

SECTION 2

Submission requirements for Future Conferences

- 2.1) Invitation to Submit
- 2.2) Information Required
- 2.3) Submission Visit
- 2.4) Evaluation and Scoring of Submissions

2.1) Invitation to Submit

Submissions are invited from Areas to host National Conference. An initial letter of intent to submit should be sent to the current National Conference Officer ideally no less than three years prior to the proposed Conference. Twelve copies of the full submission document will be required for the submission visit.

2.2) Information Required

The submission document should deal with the following points of information in particular:

- 1) The proposed dates during which the Conference will be held.
- 2) The title page should detail the number of Tables and Circles in the respective Areas together with the names, addresses and telephone numbers of those lodging the submission.
- 3) Details of the membership of the Areas submitting the application together with information regarding any previous participation or submissions, if any, in the organisation of any RTBI or NALC National events, or events of a substantial nature.
- 4) Geographical details of the proposed venue supported by maps, information guides etc detailing position and facilities of major functions.
- 5) An indication of the accommodation radius detailing the number of rooms and the price range available.
The number of beds in each price range and full information about the proposed Headquarters Hotel for RTBI and NALC (as to position, price, function rooms etc).
It will be necessary to demonstrate the capability to accommodate up to 2000 delegates in a range of hotels within a reasonable travelling distance of the main venue.
The Headquarters hotel will need approximately 20 rooms for RTBI, 20 rooms for NALC and 20 rooms for the Local Convenors. Suites will be required for both National Presidents and, if possible the Local Conference Chairman and the National Conference Officer.
- 6) Full information about the parking facilities for delegates attending Conference.
- 7) Details of the venues, and their positions in relation to the Headquarters Hotel, for the main functions: AGM's, Civic reception, Friday evening Dinner and Ball and the final night party. These venues must be open to inspection.
- 8) The proposed arrangements for the following should be precisely specified:
 - a) RTBI Executive Meeting (Thursday) 14 seats boardroom style
 - b) RTBI National Council Meeting (Friday) 75 theatre or open square style
 - c) National Quiz Final (Friday) 250
 - d) National Debate Final (Friday) 250
 - e) National Football Final (Friday) 100
 - f) Dinner (Friday)

- g) RTBI AGM (Saturday) 1000 (inc. VIP Lunch – max 35)
 - h) NALC AGM (Saturday) 750
 - i) RTBI National Council; Meeting (Saturday Afternoon) 75 theatre style
 - j) Conference club (Thursday – Saturday) 100 – 1500
 - k) Final Night Party
 - l) NALC facilities as determined by NALC (refer to appendix)
 - m) Registration, Sales, Accommodation desks, Concession stands etc
 - n) Golf competition, and any planned tours
 - o) The Headquarters Hotel
- 9) The Local Authority should be contacted and their reaction ascertained. Any likely level of cooperation should be indicated and the possibility of sponsorship fully explored.
- 10) Transportation from hotels to the major venues.
- 11) Written confirmation from both RTBI and NALC Area Secretaries that their respective Area Councils have approved the submission.
- 12) The estimated costs of hiring venues and whether sponsored.
- 13) A detailed budget, in accordance with National Guidelines, using the attendances suggested by the National Conference Officer. All items should be costed at prices that reflect a reasonable estimate at current costs.

2.3) Submission Visit

The National Conference Officer, together with all members of the National Conference Committee, including NALC Conference Convenor and the immediate Past Conference Chairman, will visit the Area submitting for Conference and inspect all the facilities and thoroughly investigate the submission.

They will usually arrive Friday evening and meet the Local Area representatives for informal drinks.

The agenda for Saturday will be structured by the National Conference Committee and agreed with the Local Area prior to the visit. All the National Conference Committee will be involved in the inspection visits.

The Saturday Evening will take the form of a social event, for the National Conference Committee and Local Area organising the bid, format to be agreed jointly.

The decision on any submissions will be made at the next National Conference Committee meeting after the visit, and any submitting Area will be advised informally of the decision as soon as possible. However formal notification cannot be made until approval has been given at the October National Council Meeting.

All submitting Area will receive a detailed report from the National Conference Committee outlining the strengths and weaknesses of their submission.

2.4) Evaluation and scoring of submissions

Each element of the submission is scored on a scale of 1 (poor) to 10 (excellent). Different people will put a different emphasis on the importance of the various factors and the assessment must therefore be partly subjective, although the use of this scoring system is intended to make the process more objective.

The elements in alphabetical order are as follows:

1. Accommodation ...
2. AGM facilities for both RTBI and NALC ...
3. Attitude and commitment of Local Authority ...
4. Commitment and expertise of Local Area (RTBI & NALC) ...
5. Cost and value for money to delegates ...
6. Financial risk to RTBI ...
7. Headquarters Hotel suitability ...
8. Geographical considerations ...
9. Marketability of the Conference ...
10. Non AGM Venues and facilities ...
11. Other facilities/ special factors not covered elsewhere ...
12. Potential for attracting Sponsorship ...
13. Transport arrangements ...

Each element to be scored out of 10.

A copy of this evaluation and scoring sheet will be completed by each member of the submission team and submitted to the National Conference Officer, together with a written précis of each of the 13 elements above, within two weeks of the visit.

SECTION 3

Time Commitment – An Outline

- 3.1) Introduction
- 3.2) Meetings Timetable

3.1) Introduction

The time commitment demanded of both the Local Conference Executive and the Local Committee is very great indeed.

In the two years leading up to the Conference the Local Conference Convenors as a committee should meet as and when required. In addition the Convenors will have their own committee meetings before and after each main Committee meeting.

The Local Conference Executive will meet once a month before each main Committee meeting and, in addition, will attend Convenors meetings on a regular basis, each member of the Executive being responsible for a number of Convenors.

3.2) Meetings Timetable

The following timetable will serve as a useful guide:

Months –32 to -24

- 1) Executive meetings once every 2 to 3 months. Marketing, Sponsorship, Design and Publicity involved from about month –28.
- 2) Local Conference Committee built by visiting Tables, Circles, Area Meetings, etc., to speak with potential candidates and to offer encouragement.
- 3) First full Local Conference at month –24 prior to Conference.

Months –23 to –18

- 1) Local Conference Chairman joins National Conference Committee.
- 2) The three National Officers join Local Executive Committee.
- 3) Executive meetings monthly.
- 4) Local Conference Committee meetings held every 2 months. Sub-committee meetings perhaps every 6 weeks. Minutes and reports to be produced for all meetings.

Months –17 to –12

- 1) Local Conference Committee meetings continue every two months.
- 2) Finalise the interruption of Conference at AGM of RTBI and NALC. Obtain approval of RTBI National Honorary Secretary and NALC General Secretary.
- 3) Everybody expected to attend preceding Conference. A lot will be learnt from attending and shadowing your counterpart.

Months –11 to –9

- 1) Full committee meeting and produce written debriefing of preceding Conference (for submission to National Conference Officer).
- 2) Convenor's sub-committee meeting now monthly.
- 3) Some of the Local Committee should attend the Joint Liaison Meetings of RTBI and NALC held in June. It is important to take sales stalls, booking forms, and accommodation details to these meetings.
- 4) There will be many occasions when meetings need to take place during working hours:

Sponsorship meetings with sponsors.

Transport meetings with local bus companies, police

Venues meetings with Local Authorities, Fire Service, Environmental Health etc.

Catering meetings with caterers, etc.

Months –8 to –3

Increasingly time consuming.

Months –2 to Conference

Executive meetings are now increased to fortnightly. There is not long to go and all loose ends need to be tied up at this stage.

Conference

It lasts for two full days plus preparation on Thursday. Time flies, ensure rotas are in place to provide regular rest breaks to **ALL** Executive and Convenors.

No alcohol allowed at any time.

SECTION 4

Establishment of Local Conference Committee

- 4.1) Introduction
- 4.2) Committee Structures
- 4.3) Local Executive and responsibilities
- 4.4) Local Convenors Committee
- 4.5) Ladies Circle
- 4.6) Duties and Responsibilities of Executive and Convenors
 - 4.6.1) Chairman
 - 4.6.2) Vice-Chairman
 - 4.6.3) Secretary
 - 4.6.4) Treasurer
 - 4.6.5) NALC Conference Liaison
 - 4.6.6) Accommodation & Registration
 - 4.6.7) Assistant Secretary & AGM
 - 4.6.8) Area Liaison
 - 4.6.9) Communications & Sponsorship
 - 4.6.10) Design & Publicity
 - 4.6.11) Entertainment
 - 4.6.12) Presidents ADC
 - 4.6.13) Sales
 - 4.6.14) Stewarding (Manpower)
 - 4.6.15) Transport
 - 4.6.16) Venues & Catering
 - 4.6.17) Marketing
 - 4.6.18) National Liaison Officer

4.6.19) National Financial Controller

4.6.20) NALC Conference Convenor

4.6.21) National Conference Officer

4.1) Introduction

There are too many matters with the organisation of a National Conference for the situation to be approached on any basis other than a general committee comprised of Convenors who are Chairmen of their own individual sub-committees.

The appropriate division of responsibilities depends very much upon local circumstances. However the structure suggested below is a useful starting point.

In some years it might be decided to amalgamate two or more convenors jobs, or change their role. As long as the revised formats are effective and all aspects of Conference organisation are covered then any changes to suit local needs are acceptable.

4.2) Committee Structures

The Local Conference Committee consists of the Local Executive, Convenors, and the Officers appointed from the National Conference Committee, including NALC Conference Convenor.

Section 4.6 contains an outline of the roles of each of the Local Executive, Convenors and National Officers. This is not a definitive list, as previously mentioned there is always room for improvement and modification to suit local needs.

At an early stage it is important to allocate responsibilities to the members of the Local Executive. It has been found to be beneficial to operate a "sprig" type management structure as detailed in section 4.3.

4.3) Local Executive and Responsibilities

Members of the Executive have responsibility for a number of Convenorships that might be relevant to their own responsibilities. The Local Executive will comprise the following:

Chairman
Vice-Chairman
Secretary
Treasurer
NALC Conference Liaison

It may be appropriate to have another Convenor sit on the Local Executive, for instance due to past Conference experience. They do not necessarily need to have responsibility for any other Convenorships, but may be of benefit to the Executive.

Here is a suggested allocation of responsibilities:

Chairman	Legal Advisor Communications & Sponsorship Marketing
Vice-Chairman	Venues & Catering Sales Design & Publicity
Secretary	AGM & Assistant Secretary President's ADC Area Liaison
Treasurer	Accommodation & Registration Entertainment
Ladies Circle	Stewarding (Manpower) Transport

It is logical for instance to include administrative aspects of Conference within the Secretary's "sprig". Also, areas of large expenditure should be the responsibility of the Treasurer.

4.4) Local Convenors and Committee

A committee directory should be produced as soon as possible giving details of all contact telephone numbers, and E-mail addresses wherever possible. This will speed up contact throughout the committee and assist the Assistant secretary with distribution of minutes etc.

Full details of the duties and responsibilities of each Convenor are described in section 4.6.

A qualified Legal Advisor is required, but this is not a Convenorship.

4.5) Ladies Circle

NALC will appoint a Ladies Circle Conference Liaison Convenor, who will sit on the Local Executive and full committee. Every effort should be made to encourage Circlers to stand for Convenorships and positions on individual committees.

4.6) Duties and Responsibilities of Executive and Convenors

4.6.1) Chairman

- 1) To be responsible to the National Conference Committee and Host Area(s) for all matters of policy connected with Conference in consultation with the Conference Secretary, Treasurer, and National Conference Officer.
- 2) To arrange the satisfactory conduct of all meetings of the Local Conference Executive and Committee.
- 3) To liase with the Conference Secretary, Legal Advisor and National Conference Officer concerning the negotiation of all contracts on behalf of the National Association.
- 4) To liase with the National President and the General Secretary about inviting guests and speakers to the Conference functions.
- 5) To act as the chief host during Conference.
- 6) In conjunction with the National Officers, to arrange the programme for the Conference.
- 7) To appoint a Legal Advisor who must be a qualified Solicitor.
- 8) To liase with the Toastmaster on detailed arrangements of the functions.

4.6.2) Vice-Chairman

- 1) Together with the Conference Secretary to assist the Chairman in all his duties and deputise for him when necessary.
- 2) To carry out such further tasks and duties as might be agreed with the executive.
- 3) To be a general “trouble shooter”.

4.6.3) Secretary

- 1) To ensure the Conference Timetable is adhered to.
- 2) To ensure that all reports from Convenors are presented to the correct meetings of the Local Conference Committee and liaison is maintained between all Convenors of Committees.
- 3) To liaise with the Legal Advisor and Convenors regarding negotiation of all contracts on behalf of the National Association.
- 4) To ensure that all risks to personnel, equipment and cancellation and other such contingencies are adequately insured in association with the National Officers, the General Secretary and the Association's Insurance Brokers.
- 5) To ensure adequate arrangements are made throughout Conference in respect of Security, Fire precautions, Public Health and planning and all proper Authorities are informed of these arrangements.
- 6) To ensure all literature from Conference with special regard to booking forms, falls within the requirements of the Data Protection Act, by consultation with the National Conference Officer and the General Secretary.
- 7) To consult with the National Liaison officer to ensure all office facilities in the HQ Hotel are suitably equipped and staffed.
- 8) To prepare and keep updated the Conference directory and Manual including the minute by minute.
- 9) To ensure that minutes of both Executive and Committee meetings are taken and circulated (this can be undertaken by the Assistant Secretary).
- 10) To ensure that the guest lists are compiled properly, and invitations are issued.
- 11) To ensure all proper licences are obtained in respect of liquor and music.
- 12) In conjunction with the Transport Convenor to ensure that adequate insurance cover is in existence for all vehicles used during Conference and that the terms of the Insurers are adhered to.

4.6.4) Treasurer

- 1) To arrange for the signatories to the Conference sales bank account to be as follows:

For amounts up to £500 any two of the Local Chairman, Secretary or Treasurer and for figures in excess of that sum, countersigned by one of the National Conference Officer, National Financial Controller or National Honorary Treasurer..

In addition, the National Honorary Treasurer and National Conference Officer should jointly have the power to enquire on and to close the account by transfer to the Association's general account.

- 2) The national Association will open a separate bank account for the Conference, this will be administered by Marchesi House. All revenue, except sales, will be deposited into this account. Facilities for credit cards and direct debits will be provided in a similar manner.
- 3) On a monthly basis up to month –4, then fortnightly a schedule of payments received shall be sent to Marchesi House, to be reconciled against the bank account. Any problems identified shall be advised to the Treasurer, to be resolved by the Local committee.
- 4) Any payments required will be requested from Marchesi House, using an agreed form. After this has been authorised a cheque will be raised. Any invoices received directly by Marchesi House will be forwarded to the Treasurer to be checked and authorised.
- 5) To prepare periodic budgets in accordance with National Guidelines and to update as required by the National Conference officer and National Honorary Treasurer.
- 6) To properly deposit Conference funds into the Nationally held Conference account.
- 7) To ensure that members of the Local Committee keep him supplied with up to date information concerning income and expenditure of their Convenerships including out of pocket expenses and see that this information is passed to the National Financial Controller, and the Local Executive.
- 8) To ensure the provision of adequate arrangements for the security of Conference monies throughout Conference.
- 9) To prepare and submit to the National Conference Committee and the National Honorary Treasurer the final Conference Accounts for Audit by the Association's Auditors by the 31st December following Conference. Auditors fees will be met by the National Association.
- 10) To ensure that all Conveners whose responsibilities include the handling of money have suitably qualified Treasurers on their committees and to ensure that periodic reconciliation's are undertaken.

- 11) To undertake periodic reconciliation's of registration monies received with the registrations recorded by the Registration Convenor.
- 12) To complete quarterly VAT returns and submit to Marchesi House within two weeks of the Association's VAT quarter end, i.e. 31st January, 31st May, 31st August and 31st October. Note the Sales account is not to be included as this is not covered by the scope of the VAT registration, and is deemed a local account.
- 13) The National Association will meet all bank and credit card charges, however the Treasurer should take all reasonable measures to minimise the cost to the Association.

4.6.5) NALC Conference Liaison

The duties associated with this post are set out in the Ladies Circle Conference Manual reproduced in the attached appendix.

4.6.6) Accommodation & Registration

- 1) To provide a list of recommended hotels to allow delegates to book all accommodation directly.
- 2) To liase with the Transport Convenor to ensure all accommodation booked is covered by transport where applicable.
- 3) To arrange accommodation for the Master of Ceremonies where necessary.
- 4) To arrange not only accommodation, but also special facilities for Convenors and Stewards.
- 5) To establish an accommodation enquiry desk at Conference registration, and the preceding Conference and arrange for its staffing.
- 6) To arrange for any accommodation for any Artistes.
- 7) To prepare and circulate Accommodation lists to all Area Vice Chairmen via the Marketing Convenor.
- 8) To liase with the Treasurer on all matters of a financial nature.
- 9) To formulate and design the registration form in conjunction with the Local Executive and the Design and Publicity Convenor.
- 10) To design and maintain accounting and filing systems for all registration matters in conjunction with the Treasurer.
- 11) To liase throughout with the Treasurer to ensure that the accounts can be reconciled.
- 12) To process all completed Registration forms received and to keep the Conference Executive advised as to numbers.
- 13) To allocate tickets in accordance with the Local Conference Executive.
- 14) To make the necessary arrangements for pre-Conference office accommodation and accounting facilities.
- 15) To organise and staff the Registration area at Conference, determining the requirement for space, furniture, equipment and manpower.
- 16) To provide Registration numbers to the Stewarding Convenor for security at events.
- 17) To liase with the National Liaison Officer with reference to Official guests, National Executive and International guests.
- 18) To liase with the AGM Convenor in connection with the provision of the appropriate facilities by the AGM Convenor for registering voting delegates.

4.6.7) Assistant Secretary & AGM

- 1) To liaise with the National Honorary Secretary and General Secretaries, who are responsible to the President and the Association, to ensure that all requirements are met.
- 2) In conjunction with the National Honorary Secretary to arrange and organise all matters relating to the staging of the Round Table AGM, a detailed specification is available on the National web site.
- 3) To organise the seating and appropriate equipment.
- 4) To liaise with the Venues Convenor and Entertainments Convenor to ensure a first class P.A. system with warning lights for all speaking positions, including a sound recording system is available.
- 5) To ensure that a computer projection facility linked to the sound system is available for any interruptions/presentations that require it.
- 6) To ensure adequate AGM voting delegate registration facilities are available throughout Conference.
- 7) To organise the voting system in conjunction with the Secretariat.
- 8) To liaise with the National Liaison Officer and the Catering Convenor as appropriate regarding the supply of food and refreshments for the National Executive and for Delegates during the AGM.
- 9) To liaise with the Treasurer on all matters of a financial nature.
- 10) To ensure both the National Honorary Secretary and General Secretary are circulated with minutes from all AGM Committee meetings.
- 11) To ensure that minutes of all meetings of the Local Committee and its Sub-Committees are taken and circulated. To be personally responsible for taking minutes at the Committee meetings and circulating the same.
- 12) To ensure that all reports and other documentation are circulated.
- 13) To assist the Conference Secretary wherever necessary.

Details for the circulation of various minutes are as follows:

Executive Meetings

All members of the Local Conference Executive including the National Officers, plus National Honorary Secretary of RTBI and General Secretaries of both Associations.

Local Committee Meetings

- a) As Executive Meetings above.
- b) Local Conference Convenors.
- c) Both RTBI and NALC Vice presidents two years out, and Presidents one year out of Conference.

Sub-Committee Meetings

- a) All members of the sub-committee
- b) The Chairman of any related sub-committees, i.e. the Transport Convenor would receive minutes of the Accommodation sub-committee.
- c) Local Conference Executive including the National Officers.

Detailed requirements with regards to AGM are set out in Section 10.

4.6.8) Area Liaison

- 2) To ensure that all Tables in the Host Area(s) are kept informed of all aspects of Conference.
- 3) To act as liaison Contact with Tables in surrounding Areas.
- 4) To liase closely with the Stewarding Convenor in obtaining extra Stewards from outside the Area.
- 5) To organise the Local Conference Committee Dinner on the Thursday of Conference week.
- 6) To ensure that adequate arrangements are made to liase with 41 Clubs, Tangent Clubs and Circles.

4.6.9) Communications & Sponsorship

- 1) To set up and staff a Communications Centre for the duration of Conference.
- 2) To arrange for telephone systems at all venues and information desks.
- 3) To obtain necessary licences for all communications systems.
- 4) To obtain a personal communications system for all members of the Conference Committee.
- 5) To ensure a suitable communications system with all Conference controlled transport.
- 6) To ensure adequate training on the communications system is given to all users (including emergency procedures).
- 7) To liaise with the Treasurer on all matters of a financial nature.
- 8) To establish sponsorship requirements within the Committee.
- 9) Check with the preceding Conference and with the appropriate member of National Executive to ensure there are no conflicts of Sponsors.
- 10) To obtain sponsorship in cash or kind for as many items as possible including any Local Authority concessionary passes.
- 11) To ensure Sponsors receive adequate publicity of their sponsorship.
- 12) To host all Sponsors attending Conference.
- 13) To liaise with the Treasurer on all matters of a financial nature.

Detailed requirements in respect of communications are set out in section 9.

4.6.10) Design and Publicity

- 1) To be responsible for the over all design concept of Conference.
- 2) To liase with the Sales Convenor on the design of sales items.
- 3) To organise all design and printing of items for Conference, including menus, to the requirements of the various Convenors.
- 4) To liase with the NALC Conference Liaison Convenor to ensure all marketing material, venue décor, Menu cards etc. utilise the Ladies Circle logo.
- 5) To arrange a complete photographic record of Conference and ensure the National Media & PR team get copies without copyright issue as soon after the event as possible.
- 6) To compile the Presidents' Presentation albums and provide a copy for Marchesi House.
- 7) To be responsible for all internal signs required by Convenors during Conference.
- 8) To design the Conference uniform in conjunction with the Sales Convenor.
- 9) To design the registration booking forms, and Conference brochure in conjunction with the Registrations and Accommodations Convenors.
- 10) To be responsible for the décor of the venues in conjunction with the Venues Convenor.
- 11) To arrange for the artwork and copy to be sent to the National Media and PR Officer for inclusion in Tabler and Circler. Early contact is essential to enable them to understand the needs of Conference and plan the editions for best impact.
- 12) To arrange Press Conferences as appropriate throughout the build up to and at Conference, keeping the National Media & PR team aware of all developments and providing them with copies of all press releases.
- 13) To liase with the Treasurer on all matters of a financial nature, including the budget for advertising in Tabler and Circler and elsewhere.
- 14) Develop a website in conjunction with the National Media & PR team and maintain it.
- 15) Liaise with the National Media & PR team to enable them to produce a Conference edition of Tabler magazine sourcing printers and photographers that can be used to produce the magazine.

4.6.11) Entertainments

- 1) To arrange the entertainments at all functions.
- 2) To arrange for the necessary changing, storage, rest, transport and practice facilities for all performers and artistes.
- 3) To ensure that all performers have the necessary passes.
- 4) To liase with the Legal Advisor re: contracts.
- 5) To liase with the Venues & Catering Convenor on P.A. requirements for all functions.
- 6) To organise the interruption at the preceding RTBI and NALC AGM's (timings to be arranged with the National Honorary Secretary and General Secretary respectively).
- 7) To liase with the venue management to ensure their requirements are met.
- 8) It is suggested that a professional entertainments producer be appointed, however the venue may be able to provide the use of their producer.
- 9) To liase with the Treasurer on all matters of a financial nature.

4.6.12) President's ADC

- 1) To be responsible for the preparation of the President's timetable on a minute by minute basis in consultation with the President and the Conference Secretary.
- 2) To brief the President on Local and National figures attending the Conference.
- 3) To publish the President's detailed timetable and distribute it to those involved.
- 4) To ensure the President is kept aware of his minute-by-minute programme.
- 5) To liase throughout the two years leading up to Conference with the President on all relevant matters

4.6.13) Sales

- 1) In conjunction with the Design and Publicity Convenor to decide upon the Round Table and Ladies Circle sales items required.
- 2) To be responsible for all aspects of Sales, including stocking and selling, and to negotiate firm re-order prices.
- 3) To organise Sales through the Conference brochure and booking form where applicable.
- 4) To set up and run the Sales Shop for the duration of Conference and the preceding Conference.
- 5) To set up and run the Sales Shop at other National meetings as appropriate.
- 6) To liaise with RTBI National Sales and NALC National Sales on their requirements at Conference, and to ensure suitable facilities are made available.
- 7) To liaise with the Treasurer on all matters of a financial nature.
- 8) In conjunction with the National Financial Controller to organise the provision of all gifts and presentations made to convenors, speakers and guests at any of the Conference functions excluding the presentation of the Association's trophies.
- 9) In conjunction with the Conference Secretary to ensure that adequate levels of insurance cover are in force at all times.

A Ladies Circler will be a member of the Sales Committee to deal with NALC Sales.

4.6.14) Stewarding (Manpower)

- 1) To organise the recruiting and briefing of sufficient Stewards for each Conference function in order to maintain security and control of the function.
- 2) To liaise with all Convenors to ensure that their manpower requirements are met.
- 3) To draw up and distribute a daily stewarding chart.
- 4) To maintain ticket security at all functions together with the issuing of badges and passes, liaising with the Accommodation & Registrations Convenor, National Liaison Officer, President's ADC and the Venues Convenor as appropriate.
- 5) To liaise with the Fire Authorities, Police and Venue management regarding all regulations and precautions, as well as training the stewards in fire drills and ensuring that they know the necessary regulations.
- 6) To organise all first aid and medical facilities.
- 7) To organise working parties for erecting, dismantling and cleaning all necessary facilities.
- 8) To establish stewarding points at all venues as well as at the HQ Hotel and other areas as necessary.
- 9) To determine the requirements for internal signposting in liaison with the appropriate Convenors.
- 10) To organise daily briefing sessions for stewards.
- 11) To arrange with the Accommodation & Registration Convenor for accommodation for the stewards where necessary.
- 12) To make suitable arrangements for providing stewards with refreshments.
- 13) To ensure in conjunction with the Area Liaison Convenor that Tables and Circles in the host Area(s) as well as 41 Club and Tangent are kept fully informed about the arrangements for stewarding by arranging briefing meetings at intervals as appropriate.

A Ladies Circler will be a member of the Stewarding Committee to deal with specific NALC Stewarding requirements.

4.6.15) Transport

- 1) To ensure adequate transport is available to transport Delegates between their Hotels and the functions they have booked.
- 2) To provide transport where necessary for bands, cabaret artistes, guests, speakers and the toastmaster.
- 3) To arrange transport for official guests, the National Executives and National Councils in conjunction with the National Liaison Officer.
- 4) To provide and organise fuel for all Conference Transport, in conjunction with the Sponsorship Convenor.
- 5) To provide the necessary car parking facilities for official Conference Transport and Delegates vehicles.
- 6) To notify the Stewarding Convenor with regard to requirements of the Local Authority and Police of all Conference Transport movements and to implement all regulations and requirements of those various authorities.
- 7) To establish and efficiently administer a Transport Office, preferably in proximity to or in very close contact with the Communications Centre.
- 8) To arrange for adequate signposting of the Conference in the public streets with the appropriate motoring organisations.
- 9) To arrange transport for NALC, in conjunction with the NALC Conference Liaison Convenor.
- 10) To arrange, in conjunction with the Conference Secretary, tax and insurance for all casual drivers, and ensure compliance with insurance policy terms (age and driving record of driver will be considerations)
- 11) To ensure transport is available for all stewards.
- 12) To liase with local Taxi firms and associations in order to minimise conflicts of interest.
- 13) To liase with the Treasurer on all matters of a financial nature.

4.6.16) Venues & Catering

- 1) To ensure adequate furniture at all venues.
- 2) To ensure all necessary power supplies, water supplies, toilet facilities and such like are available at the various venues.
- 3) To arrange a suitable PA system at all venues in conjunction with the relevant Convenors.
- 4) To make arrangements and be responsible for the Conference Clubs.
- 5) To liaise with the Stewarding Convenor with regard to requirements of the Local Authority, Fire and Police to ensure that their requirements are met.
- 6) To liaise with the Design and Publicity Convenor regarding the decoration of the Venues.
- 7) To liaise with the Treasurer on all matters of a financial nature.
- 8) To establish the catering and bar requirements for each function and identify the specific rooms and areas to be used.
- 9) To take over all responsibility for the catering requirements.
- 10) To take over all responsibility for the bar requirements..
- 11) To take over all responsibility for the refreshments in the Conference club(s).
- 12) To liaise with the Conference Secretary on all matters regarding licences.
- 13) To arrange any special catering facilities, which may be necessary for Conference personnel, entertainers, staff or other persons involved, e.g. Police, St Johns Ambulance, etc.
- 14) To assist the National Liaison Officer to organise the seating plans for the Friday Evening function.
- 15) To ensure that adequate catering facilities are available at:
 - a. Both AGM's either on site or within the locality.
 - b. All RTBI and NALC Dinners.
- 16) To identify suitable venues for Area Dinners and to make a list available to Area Vice-Chairmen.
- 17) To identify special dietary requirements of delegates in conjunction with the Registrations Convenor and to ensure that adequate provision is made.
- 18) To liaise with the Treasurer on all matters of a financial nature.

4.6.17) Marketing

- 1) To organise the Area Chairmen/Vice-Chairmen's weekend in October at the Conference venue.
- 2) To circulate the Conference Brochure and booking form to all Areas, including Tabler & Circler magazines and the website.
- 3) To be a "problem solver" to all Area Vice-Chairmen in the booking of their Area's Delegates into Conference.
- 4) To arrange for Conference representation at as many Area events throughout RTBI and NALC in the twelve months leading up to Conference.
- 5) Maintain the website information, keeping it fresh and up to date including graphics, artwork and pictures.
- 6) Create e-mail databases for on-line registration and respond to requests on the website within 24 hours.

4.6.18) National Liaison Officer

National Liaison Officer to the Conference One Year Out.

- 1) To join the Local Conference Executive and Committee and establish a good working relationship with the Local Conference Chairman and other members of the Local Committee.
- 2) To attend all meetings of the Local Conference Executive and Committee and produce a confidential report for the National Conference Officer in respect of any meeting that the Convenor does not attend.
- 3) To ensure that the arrangements made by the Local Conference Committee do not conflict with National Interests.
- 4) To represent the National Conference Officer on matters associated with Conference whenever necessary and to represent the interests of the Local Conference Committee at meetings of the National Council.
- 5) Produce a written review of the year and a concise account of the state of affairs as at the National AGM on conclusion of Year 1 to hand on to his successor.
- 6) To attend the first meeting of the Local Executive or Committee after the end of the year to hand over to his successor.

National Liaison Officer (continued)

National Liaison Officer to the Current Conference

- 1) To attend all meetings of the Local Conference Executive and committee.
- 2) In conjunction with the National Conference Officer, to ensure that Local Conference Committee arrangements do not conflict with National interests.
- 3) To liaise with the appropriate National standing Committees to ascertain accommodation and venue requirements for all committee meetings and other activities such as debate, quiz etc.
- 4) To make all necessary arrangements for the National Executive Meetings and the National Council Meetings, and for the National Executive and partners' lunch.
- 5) To ensure that sufficient office and bedroom accommodation is reserved on the HQ Hotel for all requirements and to be responsible for the allocation of these rooms.
- 6) To be responsible for organising Conference Registrations of the National Executive and the Associations official guests.
- 7) To be responsible if necessary for handling accommodation requests for the General Secretary, Past Presidents, Official Guests and Honorary Life Members.
- 8) To attend any Local sub-committee meetings requested by the National Conference Officer.
- 9) To take responsibility for hosting Association guests at all formal receptions and functions. Members of the National Conference Committee and their partners normally assist in hosting where appropriate.
- 10) To prepare the seating plan for any official function.
- 11) To liaise with NALC to ensure principal guests receive invitations to all receptions and priority seating at all eating functions.
- 12) To liaise with the International Committee with regards to the "International" Booking form.

4.6.19) National Financial Controller

National Financial Controller to the Conference One Year Out

- 1) To join the Local Conference Executive and Committee and establish a good working relationship with the Local Conference Chairman, Treasurer and other members of the Local Committee.
- 2) To attend all meetings of the Local Conference Executive and Committee.
- 3) To ensure, by periodic inspections, that proper financial records are being kept by the Treasurer.
- 4) To offer help in the preparation of the Budgets and to ensure that proper budgetary control is being maintained.
- 5) To provide the National Conference Officer and the National Honorary Treasurer with a confidential report on the financial affairs of Conference in December and March.
- 6) To assist the National Liaison Officer whenever necessary.
- 7) To ensure that quarterly VAT returns are made to Marchesi House.
- 8) To ensure that the Local Conference Treasurer prepares an adequate working budget for presentation to the National Conference Committee in October before the National Council Meeting.
- 9) To attend the first meeting of the Local Executive or Committee after the end of the year to hand over to his successor.

National Financial Controller (continued)

National Financial Controller to the Current Conference

- 1) To attend all meetings of the Local Conference Executive and Committee and to ensure that proper financial records are being kept by the Conference Treasurer.
- 2) To assist in the preparation of budgets and to ensure that proper budgetary control is being maintained, especially during Conference week.
- 3) To be responsible for all other aspects of Financial Control – See Section 6
- 4) In conjunction with the Conference Treasurer, to be responsible for the distribution of all Hosting expenses.
- 5) To ensure that quarterly VAT returns are made to Marchesi House.
- 6) To ensure adequate insurance cover is maintained at all times.
- 7) In the week after Conference render the following accounts:
 - a. Marchesi House for all National Expenses.
 - b. National Executive for all personal expenses (and collection of same)
 - c. National standing committees for their facilities during Conference.
 - d. NALC for appropriate expenses.
- 8) To negotiate a rental fee with the National Sales Officer for a National Sales site at Conference. This is usually £500 and excludes any expenses (e.g. hire of fittings, tills etc., which should be invoiced separately)
- 9) Following the Conference to liaise with the incoming National Conference Officer and the Local Treasurer to ensure that final accounts are ready for submission to the National Honorary Treasurer by 31st October following Conference.
- 10)
- 11) To attend any Local sub-committee meetings as requested by the National Conference Officer.
- 12) To provide a detailed report for the National Financial Controller of the next Conference.

4.6.20) NALC Conference Convenor

The Conference duties associated with this post are set out in the NALC Conference Manual reproduced in the attached appendix.

4.6.21) National Conference Officer

- 1) To take overall responsibility for the organisation of National Conference on behalf of RTBI.
- 2) To implement policy regarding National Conference as determined by National Council.
- 3) To report to and be responsible to the National Executive and National Council on all matters relating to National Conference.
- 4) To appoint Liaison Officers and Financial Controllers to the Local Executives of the Conferences for the current and following year.
- 5) Attend as many Local Conference Executive and Committee meetings as possible for both the current and one year out Conference.
- 6) To receive and comment on the minutes of the Local Executive for the Conference two years out and attend their meetings as appropriate (usually one or two in the year).
- 7) To offer advice to the Local Area for the Conference three years out on the criteria required for their selection of the Local Conference Executive and to ensure the appointment and approval thereof by National Council.
- 8) To ensure the submission process for the selection future National Conference venues is organised in a fair and efficient manner.
- 9) In conjunction with the National Honorary Treasurer, to determine the registration numbers that can be budgeted on periodically.
- 10) In conjunction with the National Honorary Treasurer, to authorise any request for interest free loans from the Association.
- 11) To arrange for the National Honorary Secretary to approve all contracts that the Local Conference Committee wish to enter into on behalf of the Association.
- 12) Ensure that the requirements of RTBI and NALC are met by the Local Conference Committee.
- 13) To give final approval, or otherwise, on proposals made by the Local Conference Executive where there is a conflict between Local and National interests.
- 14) To ensure that final accounts are available for presentation to the National Honorary Treasurer for audit purposes by 31st October following Conference.

SECTION 5

Flexible Outline Timetables

- 5.1) Introduction
- 5.2) Full Committee Outline Programme

5.1) Introduction

The following timetables are meant to be a general guide to the sort of timescale involved in the three year run up to Round Table National Conference.

They are not meant to be “blow by blow” guides but merely to offer an indication of the various tasks that should be approaching completion at given dates.

Many things are likely to alter this timetable locally and it will be advantageous for the Local Conference Chairman to work out his own idea of how arrangements should proceed, setting a number of deadlines for the Convenors who could then prepare their own schedules. In this way the organisation of Conference can proceed in an orderly manner and progress can be easily monitored.

Tablers and Circlers are prone to judge the desirability of attending your conference by the efficiency and cheerfulness of those Local Committee Members with whom they come into contact. For example the Accommodation & Registration Convenor, and later the Transport Convenor. The sooner their arrangements are finalised the better, for then firm answers can be given to any enquiries in the knowledge that the information given is correct.

Remember Conference must be **SOLD**. A good marketing technique is essential.

Round Table and Ladies Circle are our hobbies! So enjoy organising Conference.

5.2) Full Committee Outline Programme

Month –32

The names of the proposed Local Conference Chairman, Secretary and Treasurer as agreed by the Host Area Council should be submitted to the National Conference Officer for consideration by the National Conference Committee, who will make a recommendation to the next National Council Meeting.

Month –28

A full coloured copy of the Logo artwork should be submitted to the National Conference Officer for consideration by the National Executive at their next Meeting. The National Executive will not approve any Logo that involves the rondel being obscured or distorted in any way.

It should be borne in mind that with RTBI the new rondel should be used if practicable. Furthermore it should be noted that the Conference Logo should in its NALC format carry their current logo.

See the appendix at the end of this manual for further guidance.

Some Convenors may be appointed by now, especially Sponsorship. It is suggested that Convenors are not appointed before they have a job to do.

Month –24

Attendance at Conference is beneficial.

Month –23

- 1) Establish Banking arrangements; look for a friendly Bank to obtain an overdraft at nil interest for working capital. This is to cover Committee expenses, letterheads, etc.
- 2) Establish regular full Committee meetings at least once every two months until after the end of the calendar year, then monthly.
- 3) Draw up rules for Committee expenses.
- 4) After completion of the main Committee, begin forming sub-committees who should draw up their own meeting timetables.
- 5) Establish a system of paperwork and stress the absolute importance of sub-committee minutes and Convenors giving written reports prior to the main meetings.
- 6) Sponsorship packages should be ready for sale to prospective sponsors. Obtain publicity material from Conference just past.

- 7) Confirm all venues, scrutinise conditions of all contracts and investigate any fire restrictions.
- 8) Prepare and distribute Conference Directory.

Month –22

Write specification for the Accommodation booking agent and distribute to interested candidates. Interview those interested and appoint if appropriate.

Month –20

- 1) The Treasurer should prepare a budgeted cash flow forecast identifying items of expenditure that will be incurred, prior to the receipt of registration deposits, and apply to the National honorary Treasurer through the National Conference officer for an interest free loan from the Association.
- 2) Sales items to be sold at current Conference should be agreed. Seek advice from the National Conference Officer as to whether approval is required from the National Sales Convenor. NALC items should be included in the Sales stock. Obtain samples; decide on initial and re-order quantities and pricing structure. Decide upon manpower and facilities required for the Sales stand at current Conference and ensure that the Area Liaison Convenor is informed if help is required. Check facilities with current Conference Sales.
- 3) Area Liaison begins organisation.
- 4) Entertainment commences negotiations to appoint a professional entertainment producer or agent if appropriate.

Month –18

- 1) Prepare publicity for current Conference, decide upon theme and develop design concepts. Ensure Local Authorities and Hoteliers are aware of Conference.
- 2) Design Registration booking form and determine booking conditions.
- 3) Draft proposals from all Convenors especially Transport and Communications.
- 4) The Local Conference Executive together with the appropriate Convenors should attend the Area Chairmen/Vice-Chairmen's weekend organised by the current Conference.

Month –16

- 1) Finalise copy of Registration booking form and promotional booklet for distribution at the current Conference.
- 2) Review RTBI and NALC arrangements.
- 3) Ensure staff passes are arranged with current Conference Secretary.

- 4) Prepare full draft budget in order to confirm registration prices for inclusion in the booking form.

Month –14

- 1) Confirm all arrangements for current Conference; Brochure, Booking form, Sales activities (sales stand, tills, etc.) helpers, transport etc.
- 2) Ensure National Honorary Secretaries of both RTBI and NALC know of AGM interruption.
- 3) Confirm uniform design for attending current Conference.

Month –12

Attend Conference – Lots to learn from shadowing your opposite number.

Month –11

- 1) Full Committee meeting to conduct post mortem on previous Conference.
- 2) Prepare full draft budget, for submission to National Conference Committee for National Honorary Treasurer in June.
- 3) Area Liaison plans drawn up, with firm dates for regular meetings, and full publicity.
- 4) Establish concessionary booking scheme for Stewards, Drivers etc.
- 5) Registration booking system implemented.
- 6) Check copy dates and costing for insertions into “Tabler” and “Circler” magazines.
- 7) Arrangement for sale and promotion at Joint Liaison Meeting/National Council Meeting in June/July – National Officers to help.
- 8) Sponsorship now extremely important.
- 9) Firm arrangements for Committee and sub-committee meeting dates and reporting for minutes etc.
- 10) Confirm accommodation arrangements.

Month –10

- 1) Complete a review of all aspects of organisation. Preparation of work schedules.
- 2) Consultations with Fire, Police and Venue Management as appropriate.
- 3) Review specific sponsorship requirements.

- 4) National Liaison Officer to undertake the following tasks:
 - a) Issue Booking forms to National Executive and Councillors.
 - b) Issue Booking forms to guests, HQ staff etc.
 - c) Liase with other standing committees for requirements.
 - d) Agree booking system with National IRO.
 - e) Obtain room plans of HQ Hotel.
- 5) National Financial Controller to begin planning gift presentations.
- 6) Arrange for weekly print out of package numbers sold with comparison to past conferences to be sent to Conference Executive including National Officers.
- 7) Invitations for Area Chairmen/Vice-Chairmen's weekend to be sent out.

Month –8

- 1) Communicate with National Honorary Secretaries and General Secretaries of both RTBI and NALC with reference to AGM facilities.
- 2) Prepare provisional Communications, Transport and Stewarding schedules.
- 3) Confirm National and next Conference Sales' requirements.

Month –7

- 1) Entertainments programme, including arrangements for Conference Clubs, nearly complete.
- 2) Conference Brochure, menus, tickets delegate badges, etc. design proceeding.
- 3) Check speakers if appropriate with both Presidents.
- 4) All Convenors working together.
- 5) Executive members should be liasing closely with their Convenors to ensure all arrangements running smoothly.
- 6) Review all aspects of Insurances.
- 7) Consider holding joint Convenors meetings where small groups of Convenors with related duties can confer.

Month –6

- 1) Prepare final working budget.
- 2) Ensure National representatives uniforms ordered so that they can wear them at March National Council Meeting.
- 3) Agree Delegate badge categories and colours etc.

- 4) Sort out receptions.
- 5) Contact next Conference to confirm their requirements.

Month –5

- 1) Present final working budget to National Conference Committee. National Financial Controller and Treasurer to monitor expenditure and income against budget.
- 2) Provide draft transport schedules.
- 3) ADC to present President's draft minute by minute to Convenors and the National Liaison Officer.
- 4) All Convenors preparing their own manuals and Conference programmes. Should be close co-operation to ensure no conflicting times or venues, liase through Conference Secretary.

Month –4 to –2

- 1) Constant review of all aspects of Conference organisation, with particular emphasis on budgetary control.
- 2) Draft minute by minute prepared by Conference Secretary.
- 3) Draft Conference Brochure.
- 4) Finalise transport schedules.
- 5) Final draft of all menu cards, delegates' badges, etc.
- 6) Stewards' and Drivers' catering and sleeping arrangements finalised. Rotas completed. Steward's manual with all procedures detailed, in preparation.

Month –1

Finalisation of all outstanding points. Preparation of manuals. Printing of all items.

Month 0

CONFERENCE TAKES PLACE.

Months +1 to +3

- 1) Ensure all items of use to succeeding Conference are retrieved and handed to National Conference Officer as soon as possible.
- 2) Ensure all accounts are paid, and final accounts passed to National Honorary Treasurer via National Conference Officer for Audit by RTBI.

SECTION 6

Financial Requirements and Duties of Conference Treasurer.

- 6.1) Introduction
- 6.2) Treasurer's Timetable.
- 6.3) Preparation of Conference Budget
 - 6.3.1) RTBI and NALC AGM Budget
 - 6.3.2) Full Conference Budget
 - a) Attendance
 - b) Sponsorship
 - c) Sales Revenue
 - d) Expenditure

6.1) Introduction

The Conference budgets and accounts are complex and it is necessary to have a Treasurer who has the knowledge and understanding of budgetary controls and above all else the time to devote to this function.

The Conference Treasurer is charged with producing, and managing a balanced budget.

6.2) Treasurer's Timetable

The first duty is to establish which clearing bank will be used; initially a local bank convenient for the Treasurer but obviously the sponsorship side of things will need to be considered carefully. At the outset only one bank account need be opened.

A number of Conference Budgets, in accordance with National Guidelines are produced in the months leading up to Conference.

The following is a summary of the financial timetable:

Month -48

Preliminary Budget, which is given when presenting the Submission to Host Conference.

Month -22

Open all required bank accounts and prepare budgeted cash flow.

Month -20

Revised draft budget presented to the National Conference Committee meeting in October.

Month -14

- 1) Detailed budget presented to Local Convenors and the implications of that budget explained. If this is not done there will be no discussion and individual Convenors will only blame the Treasurer for errors in their budget.
- 2) Open credit card sales account. RTBI has negotiated a special rate. Check first before trying to negotiate rates.
- 3) First working budget presented to National Conference Committee. This budget is used to finally agree the cost of registration packages and is therefore an extremely important budget. Also, attempt to obtain sponsorship to cover the cost of producing the Registration booking form.

Month -11

- 1) Update on Budget, after approval, a copy of the budget should be sent to all Convenors. Advise all Convenors to destroy previous copies of budgets.

- 2) At the same time spending limits should be given to all Convenors (ignoring Sponsorship in kind).

Month -9

Ensure that registration and accommodation systems for dealing with bookings and cash are operational and that regular reconciliations are made of registrations received with monies banked.

Month -8

Obtain a supply of appropriate paying in books for registration and accommodation. Pass these over with appropriate credit/debit card stationery.

Month -7

Maintain records of registration and accommodation bookings. Keep records of amounts and numbers for completion of final working budget.

Month -6

Update budget for presentation at the October meeting of the National Conference Committee. Agree final working budget with Local Convenors.

Month -4

Final working budget to be agreed with the National Conference Officer.

Month -2

Final budget approved at the February meeting of the National Conference Committee.

Month -2 to -1

- 1) Prepare revised budgets based on actual registration numbers for presentation at each Local Executive meeting.
- 2) Present revised figures at the Committee meeting each month to confirm any sponsorship requirement/cost cutting.

Month 0

CONFERENCE IS HERE.

Month +1

Present initial accounts to Local Conference Chairman for approval.

Month +6

Final accounts passed to National Honorary Treasurer via National Conference Officer for auditing by RTBI.

6.3) Preparation of Conference Budget

6.3.1) RTBI and NALC AGM Budget

Both RTBI and NALC have agreed a fixed contribution to the cost of staging their respective AGM's. The amounts agreed are as follows:

RTBI £16,500

NALC £6,000

The level of contribution is subject to periodic review by both associations.

The figures stated within this manual exclude VAT

The contributions of both Associations are to cover the cost of holding their respective AGM's, National Executive Meetings and National Council Meetings relevant to their AGM's throughout Conference Week, together with the hosting requirements set out in this manual.

6.3.2) Full Conference Budget

The budget is complex and it is not possible to detail how all items are calculated. The National Conference Officer or the National Financial Controller will be able to supply guidance and copies of the budgets and accounts of previous conferences.

A number of key points should however be noted:

a) Attendance

Attendance at Conference varies from year to year and it is normal practice for the National Conference Officer to consult with the National Honorary Treasurer to determine the numbers that can be used to formulate the budget.

The budgeted attendance should be a realistic estimate. It is better to allow for expansion in the budgets as time passes and as income from packages, sponsorship, etc., increases. If the budget is set on too high an estimate attendance then Convenors can get demoralised if their plans are suddenly trimmed back.

b) Sponsorship

At the time of presenting the initial budget the level of sponsorship is unknown. The search for sponsorship and advertising always continues until the last moment.

No unconfirmed sponsorship should be shown in the budget.

c) Sales Revenue

A realistic estimate is required, based on previous Conference sales. It is important to design an interesting and exciting range of Sales items. The items chosen should be agreed with the National Conference Officer.

d) Expenditure

Expenditure should be estimated as carefully as possible and realistic contingencies built into the budgets. It is especially important to do this at an early stage.

SECTION 7

Financial Allowances – RTBI and NALC

- 7.1) Items which are the responsibility of RTBI and NALC
 - 7.1.1) National Representatives
 - 7.1.2) Local Conference Chairman – Attendance at National Conference Committee Meetings
 - 7.1.3) General Secretaries and Members of the National Executive – Attendance at Local Conference Committee Meetings
 - 7.1.4) Headquarters staff at Conference
 - 7.1.5) Function tickets for Headquarters staff
 - 7.1.6) Association guests at Conference
 - 7.1.7) RTBI presentations at Conference
 - 7.1.8) Provision of meeting space at Conference for both RTBI and NALC
- 7.2) Items which are the responsibility of Conference
 - 7.2.1) Presidents
 - 7.2.2) National Conference Officer and Local Conference Chairman
 - 7.2.3) Receptions
 - 7.2.4) RTBI National Executive Lunch (Thursday)
 - 7.2.5) Incoming Presidents Cocktail party (Saturday)
 - 7.2.6) Guests
 - 7.2.7) Top Table Wines and Liqueurs
 - 7.2.8) Individual Hosting
 - 7.2.9) Reimbursement from the Association
- 7.3) Local Conference Committee Allowances (including National Liaison Officer and National Financial Controller)
 - 7.3.1) Attendance at preceding Conference
 - 7.3.2) Accommodation

7.3.3) Committee Tickets and Packages

7.3.4) Local Committee Dinner (Thursday) and Farewell Lunch (Sunday)

7.3.5) Post Conference Function

7.4) Gifts and Bouquets

The responsibility for items of expense, whether they be RTBI, NALC or Local Conference have over the course of the years been a cause for confusion and misunderstanding.

The notes which follow are intended to define what expenses can legitimately be claimed and from what sources they should be paid.

7.1) Items which are the responsibility of RTBI and NALC

7.1.1) National Representatives

The National Representatives are:

National Conference Officer
National Liaison Officer
National Financial Controller

The following expenses, at National Council rates are reimbursed by RTBI:

- a) Travelling expenses to Local Conference meetings, both Committee and Executive.
- b) Overnight accommodation when approved by the National Conference Officer.

The expenses of the NALC Conference Convenor are met by NALC.

7.1.2) Local Conference Chairman – Attendance at National Conference Committee Meetings

The Local Conference Chairman and any other members of the Local Committee specifically requested to attend meetings of the National Conference Committee will be reimbursed their travelling and subsistence allowances at current National Council rates. These are reimbursed by RTBI.

The Local Conference Treasurer should attend the National Conference Committee meeting where the Conference Budget is discussed.

7.1.3) General Secretaries and members of the National Executive – Attendance at Local Conference Committee Meetings

The General Secretaries of RTBI and NALC normally attend a number of Local Conference Committee meetings during the year. Their respective Associations will pay for their travelling expenses, hotel accommodation and meals.

The RTBI President normally attends the Local Committee meeting twice during the final year. The Honorary Secretary will need to attend the Full Committee at least once, but also a number of AGM sub-committee meetings. Their travelling expenses and subsistence are paid by RTBI.

7.1.4) Headquarters staff at Conference

Travelling expenses, hotel accommodation and subsistence allowances for the General Secretaries, their partners and members of the Headquarters staff will be paid by their respective Associations.

7.1.5) Function Tickets for Headquarters staff

Their respective Associations will reimburse the cost of function tickets for the General Secretaries and their partners to Conference.

7.1.6) Association Guests at Conference

The cost of hotel accommodation, function tickets and meals incurred at the Conference by the following Guests and others specifically invited by the Association will be paid for by RTBI:

The Honorary Life Members and their partners
The President of Rotary and his partner
The President of 41 Club and his partner
The president of WOCO and his partner
One official Guest and his partner

7.1.7) RTBI Presentations at Conference

The Association or the National President will provide gifts to be presented to the 41 Club and Rotary Presidents at the AGM.

7.1.8) Provision of meeting space at Conference for both RTBI and NALC

- a) The respective Associations will pay for any hire charges for rooms for the National Executive, National Council and Committee meetings and the General Secretaries offices. If these rooms are provided to Conference free of charge then no charge will be made.
- b) The cost of providing facilities for National Standing Committee events is to be charged to the appropriate standing Committees, with the exclusion of Sports & Social in respect of Quiz, Debate & Football.

7.2) Items which are the responsibility of Conference

7.2.1) Presidents

- a) Tickets to all functions for both Presidents and their partners.

7.2.2) National Conference Officer and Local Conference Chairman

The National Conference Officer and Local Conference Chairman and their partners are to be provided with Hotel rooms from Wednesday to Sunday, together with function tickets for the period of Conference (including Wednesday dinner and Sunday farewell lunch).

7.2.3) Receptions

The requirements for the reception prior to the Friday evening function should be agreed with the Presidents, National Conference Officer and Local Conference Chairman.

7.2.4) RTBI National Executive Lunch (Thursday)

The Conference budget pays for the National President and his partner.

7.2.5) Incoming President's Cocktail Party (Saturday)

This is held after the National Council meeting on Saturday and is when the new President hands out briefs to the new National Executive.

7.2.6) Guests

The following meals should be included in the appropriate function budgets as follows:

Friday Evening Dinner:

Sponsor and partner
RTBI International Officer and partner
RTBI National Vice President and partner
Civic Dignitary and partner (where appropriate)
Speaker

7.2.7) Top Table Wines and Liqueurs

It is normal practice to include wines and liqueurs on the top table at the Friday evening function.

7.2.8) Individual Hosting

The International Committee is responsible for hosting International guests and visitors at the Friday evening function. They have their own budget for this purpose. It is important for them to be positioned with their respective guests.

The responsibility for hosting RTBI's other guests lies with the National Liaison Officer.

7.2.9) Reimbursement from the Association

Four overnight subsistence claims, at National Council rates, National Conference Officer, National Liaison Officer and National Financial Controller are paid to Conference by RTBI.

7.3) Local Conference Committee Allowances (Including National Liaison Officer and National Financial Controller)

7.3.1) Attendance at Preceding Conference

Hotel accommodation and breakfast is paid from the Conference account for all Local Executive and Convenors from Thursday to Saturday.

Travelling and subsistence costs are paid as agreed by the Conference treasurer.

7.3.2) Accommodation

Accommodation in the Headquarters Hotel is to be provided for the Local Committee and their partners from Thursday to Saturday inclusive. Extra nights are allowable at the discretion of the National Conference Officer.

Costs for laundering and cleaning uniforms during Conference will be paid by Conference.

7.3.3) Committee Tickets and Packages

In the case of the Friday Evening function all Convenors and their partners should be provided with a ticket, subject to sufficient manpower being available to provide cover.

7.3.4) Local Committee Dinner (Thursday) and Farewell Lunch (Sunday)

The following receive tickets for each function from the Conference budget:

All Local Conference Committee Members and partners
National Representatives and partners
Outgoing RTBI National President and partner
Outgoing NALC National President and partner

7.3.5) Post Conference Function

Each Conference Committee holds a reunion every year to which are invited all the Local Committee, National Officers, Both National Presidents for that Conference and all partners.

Those attending meet the cost of this function and no allowance should be made from Conference funds.

7.4) Gifts and Bouquets

Full details of the requirements for gifts and bouquets are shown in Section 8 under the respective function.

SECTION 8

Format of RTBI Functions During Conference Week

- 8.1) Thursday Evening Local Committee Dinner
- 8.2) Thursday National Executive Lunch
- 8.3) Friday National Conference Committee Lunch
- 8.4) Friday Evening VIP Reception
- 8.5) Friday Evening Dinner
- 8.6) Saturday National Executive Lunch
- 8.7) Saturday Evening Incoming President's Reception
- 8.8) Sunday Local Committee Lunch

8.1) Thursday Evening Local Committee Dinner

8.1.1) Responsibility - Local Area Liaison & National Financial Controller

8.1.2) Invitations
RTBI National Executive & Partners
NALC National Executive & Partners
RTBI General Secretary & Partner
NALC General Secretary & Partner
Local Conference Committee (Including: National Officers & Partners)
Local Conference Executive & Partners
Immediate Past National Conference Officer & Partner
Following Year Conference Committee & Partners
Master of Ceremonies
Any others at the discretion of Local Conference Chairman

8.1.3) Venue Suitable venue close to HQ Hotel

8.1.4) Finance Cash Bar

Meals Charged to Conference:

RTBI President & Partner
NALC President & Partner
Local Conference Committee (Including National Officers) & Partners

Meals Charged to RTBI:

RTBI General Secretary & Partner

Meals Charged to NALC:

NALC General Secretary & Partner

Meals Charged to Individuals:

All others attending

8.1.5) Dress Conference Uniform, Formal

8.1.6) Format Usually a Dinner Dance. Seating plan
Arranged to spread Convenors amongst the Tables

8.1.7) Programme
20.00 Transport to Venue if required
Table /Circle Grace
Dinner Commences
Loyal Toast

Presentations:

Welcome by Local RTBI Area Chairman
Introduction and toast to Local Conference Committee by National Conference Officer
Response by Local Conference Chairman

Both National Presidents give a greeting

00.0 Transport back to Hotel
No More Alcohol

8.1.8) Requirements

Local Area Liaison/National Financial Controller to issue invitations and collect payment where necessary.

1 microphone (PA System)

Disco/Entertainment

Toast Master – Usually Local Area Liaison or National Financial Controller

8.2) Thursday National Executive Lunch

8.2.1) Responsibility	National Liaison Officer
8.2.2) Invitations	RTBI National Executive & Partners RTBI General Secretary & Partner
8.2.3) Venue	Usually near the venue of the National Executive meeting
8.2.4) Finance	Cash Bar National President & Partner charged to Conference General Secretary & Partner charged to RTBI All others attending pay
8.2.5) Dress	Conference Uniform, Jacket & Tie
8.2.6) Format	Informal Lunch
8.2.7) Programme	12.00 Partners meet for pre-lunch drinks 12.15 National Exec Meeting Finishes 12.30 Photo call 13.00 Lunch Commences 14.00 National Exec Meeting Reconvenes
8.2.8) Requirements	No seating plan Photographer National Financial Controller collects payments

8.3) Friday National Conference Committee Lunch

8.3.1) Responsibility	National Conference Officer
8.3.2) Invitations	All National Conference Committee & Partners Local Conference Chairman & Partner Following Year Local Conference Chairman & Partner Others at the discretion of National Conference Officer
8.3.3) Venue	Local Restaurant
8.3.4) Finance	All pay
8.3.5) Dress	Conference Uniforms or lounge suits
8.3.6) Format	Lunch with presentations: Conference Officer to Committee Committee to Conference Officer
8.3.7) Programme	12.45 Transport to restaurant 13.00 Lunch Commences 14.15 Transport back to Conference
8.3.8) Requirements	National Conference Officer to issue Invitations and book restaurant

8.4) Friday Evening VIP Reception

8.4.1) Responsibility	Local Conference Committee
8.4.2) Invitations	RTBI National Executive & Partners NALC National Executive & Partners RTBI Honorary Life Member & Partner Local Conference Chairman & Partner Rotary President & Partner 41 Club President & Partner Tangent President & Partner Mayor & Mayoress (if invited to dinner) National Conference Officer & Partner RTBI General Secretary & Partner NALC General Secretary & Partner RTBI Official Guests & Partners NALC Official Guests & Partners All International Guests & Partners Guest Speaker and Partner Sponsor's Party Local Sponsorship Convenor & Partner Local Conference Committee & Partners
8.4.3) Venue	Conference Venue
8.4.4) Finance	Drinks on Arrival Additional Drinks for Official Guests and Sponsor's party Cash Bar
8.4.5) Dress	Conference Uniform, National Costume or Lounge Suits
8.4.6) Format	Formal Drinks Reception
8.4.7) Programme	18.00 Reception Commences 18.45 Guests other than Top Table move to their seats at dinner 18.55 Top Table guests to Dinner
8.4.8) Requirements	Issue Invitations – National Liaison Officer Usher – National Liaison Officer Toast Master Drink on arrival National Liaison Officer and members of the National Conference Committee act as Hosts for Official Guests and Honorary Life Member. Sponsorship Convenor to host the sponsors

8.5) Friday Evening Dinner

- 8.5.1) Responsibility Local Conference Committee
- 8.5.2) Invitations All who have purchased a ticket
- 8.5.3) Venue Conference Venue
- 8.5.4) Finance Ticket Entry
- 8.5.5) Dress Conference Uniform, National Costume or Lounge Suits
- 8.5.6) Format Formal Dinner, Speeches & Entertainment
- 8.5.7) Programme
- 19.00 Top Table Introduced
 - 19.10 Table Grace by National Conference Officer
 - Circle Grace by NALC Conference Convenor
 - Presentations by International Guests (usually between courses)
 - Loyal Toast by Local Conference Chairman
 - Presentation of gift to RTBI National President's partner by Vice President (provided by RTBI)
 - Presentation of gift to NALC National President's partner by Vice President (provided by NALC)
 - RTBI National President
 - NALC National President
 - Guest Speaker
 - Final Toast to RTBI & NALC
- 8.5.8) Requirements
- Toast Master to be M.C.
 - Top Table seating plan & General Seating plan-National Liaison Officer
 - PA System with ample microphones (including one with stand for Toast Master)
 - Separate Table adjacent to Top Table for Toast Master's meal
 - Flowers for Top Table Ladies – National Financial Controller

8.5.9) Top Table

Local Conference Chairman & Partner
RTBI National President & Partner
NALC National President & Partner
RTBI National Vice President & Partner
NALC National Vice President & Partner
National Conference Officer & Partner
Guest Speaker & Partner
Sponsor & Partner (if appropriate)
41 Club President & Partner
Tangent President & Partner
RTBI Honorary Life Member & Partner
Mayor & Mayoress (if invited)
Rotary President & Partner
NALC Conference Convenor & Partner

If space is limited on the Top Table, it is not necessary for either RTBI National Conference Officer or NALC Conference Convenor to sit at Top Table. In which case both Graces will be given from the Toast Master's microphone.

8.6) Saturday National Executive Lunch

8.6.1) Responsibility	National Liaison Officer
8.6.2) Invitations	RTBI National Executive RTBI Official Guests RTBI General Secretary All past National Presidents
8.6.3) Venue	Convenient for AGM venue
8.6.4) Finance	Cash bar Meals charged to RTBI: RTBI General Secretary RTBI Official Guests Meals charged to Conference: RTBI National President All others pay
8.6.5) Dress	Conference Uniform, Jacket & Tie
8.6.6) Format	Informal Private Lunch
8.6.7) Programme	12.45 – 13.45 Lunch
8.6.8) Requirements	Waiter service for food & bar No seating plan National Financial Controller collects payments

8.7) Saturday Evening Incoming President's Reception

8.7.1) Responsibility	New President's ADC (a member of the Presidential Liaison Committee)
8.7.2) Invitations	New President & Partner Incoming National Executive & Partners RTBI General Secretary & Partner
8.7.3) Venue	Suitable function room in HQ Hotel
8.7.4) Finance	Conference makes a contribution of £300
8.7.5) Dress	Conference Uniform, Jacket & Tie
8.7.6) Format	At the discretion of incoming President
8.7.7) Programme	19.30 – Function starts
8.7.8) Requirements	At the discretion of the incoming President. Transport as agreed with P.L.C.

8.8) Sunday Local Committee Lunch

8.8.1) Responsibility	Local Conference Chairman
8.8.2) Invitations	Local Conference Committee (including National Officers & Partners) Outgoing RTBI National President & Partner Outgoing NALC National President & Partner
8.8.3) Venue	Suitable function room, usually in HQ Hotel
8.8.4) Finance	Meals to Conference Cash Bar
8.8.5) Dress	Conference Uniform, Jacket & Tie
8.8.6) Format	At the discretion of Local Conference Chairman
8.8.7) Programme	At the discretion of Local Conference Chairman
8.8.8) Requirements	At the discretion of Local Conference Chairman

Plus gifts for all Convenors, National Officers, both National Presidents and all partners – National Financial Controller in conjunction with Local Conference Chairman

SECTION 9

Suggested Communication System

9.1) Main Communication Room

9.2) Transport Room

9.3) Personal Radios

9.1) Main Communication Room

This room would normally be situated in the Conference Venue and would be continually manned as long as any Conference event is being held and is designed to facilitate easy liaison between the Conference delegate and the organisers and between the various Conference Convenors and their Committee members and all organisational personnel.

The room should have in it the following:

Personal Radio System base station

This is a small radio set, run on mains electricity attached to a loudspeaker and microphone with which selected Conference personnel can be contacted by radio via their own personal hand sets which are, of course, on the same radio wavelength as the base station. Convenors can in turn contact the communication room.

The base station is served by an aerial which must be erected on the roof of the building in which the communications room is situated.

Check on insurance with the owners of the building.

Check that the building is situated suitably for radio transmissions, i.e. carry out tests with the equipment prior to installation. Contractors should not charge too much and it is worthwhile being confident that the system will work when Conference begins!

Telephones

There should be one telephone number, known only to selected personnel (suggest Convenors only) that can be used in emergency. The numbers of the other lines are published in Conference material collected upon registration by the Conference delegate, so that the Conference delegate can contact the room for information or assistance.

Location Board

This is a board, which is designed to show at any given time the exact whereabouts of a Convenor (or other personnel) at a glance from those manning the room.

The board will have down its side the names of Convenors and along the top the names of various venues (including "in transit" and "off duty"). Magnetic strips are moved to the appropriate position to show where the Convenor is at that time. The system will only work if Convenors report via their radios every time they alter their position.

Clock

Essential, obviously.

Directories

Telephone Directories, as many Table Directories as possible, the National Directory and the International Directory. Also the Conference manual and full minute-by-minute must be available. Each Convenor should have given to the Communications Convenor a full list of telephone numbers of his sub-committee members. In other words, there must be in the room the telephone number of anyone that any Convenor is likely to need to contact during the Conference.

Emergency Numbers

Local Doctors, hospitals, Dentists and Police Station.

Manpower

At least three on duty at any time. One to man the radio set, and two to work the telephones.

9.2) Transport Room

The various courtesy vehicles must at all times be in radio contact with the Transport room. The transport room should have a base station similar to the one in the communications room.

It is suggested that the Transport room be next door to the Communications room, but not in the same room because of the noise of two separate radio systems.

There will be need to be telephones in the transport room, and again there should be one number for emergency use by selected personnel and other numbers are published to Conference delegates which they can use to arrange their transport requirements.

9.3) Personal Radios

Convenors should be given a personal radio to link them at all times with the base station in the Communications room.

Spare batteries should be available, as the batteries will need re-charging during Conference.

To help ensure radio channels are not blocked, it is suggested four channels are used for different needs. A suggested system is listed below:

Channel 1	“Charlie”	All Convenors
Channel 2	“Tango”	Transport Convenor Transport Committee All Drivers
Channel 3	“Sierra”	Stewarding Convenor Stewarding Committee Key Stewarding points
Channel 4	“Echo”	Entertainment Convenor Entertainment Committee

Each radio user should be given a “call sign” on their channel (e.g. Conference Chairman “Charlie 1”). Convenors with access to more than one channel should have a separate call sign for each channel.

With the exception of Transport, Stewarding and Entertainments Convenors, all users should only broadcast on their own channel. If a Convenor needs to speak to someone on another channel, a message should be sent to the Communications room, and they will arrange contact.

SECTION 10

RTBI Annual General Meeting

- 1) Provisions for AGM
- 2) AGM Registration
- 3) AGM Layout and Platform
- 4) AGM Organisation
- 5) Committee Duties and Liaison
- 6) Posters and Signs
- 7) General

10.1 Provisions for AGM

The duties of the AGM Convener will not achieve prominence until the previous Annual General Meeting has been completed and the dust has settled. It is important however for him to make contact at a very early stage with his counterpart for the previous Conference in order that he is fully aware, through liaison, of the events and circumstances which lead up to each Annual General Meeting and as part of the stewarding team on the day.

Following the preceding Conference he should form his committee, which should number no more than four individuals, one of whom must be identified at an early stage as the Deputy AGM Convener, and committee meetings should commence. In the early stages these meetings will be purely of a liaison nature to keep the committee members informed of Local Conference activity and it is not until the October/November prior to the National Conference that the committee will need to start operating on a monthly basis. The prime duty of the AGM Convener will be split between his role as a member of the Local Conference Committee and as liaison with the RTBI General Secretary and the National Honorary Secretary for the specific areas of organisation for the Annual General Meeting itself.

It should be remembered, contrary to popular opinion that Conference occurs because of the Annual General Meeting and not vice versa.

Minutes of all Meetings of the AGM Committee must be sent or e-mailed to the national Honorary Secretary and the General Secretary.

During January, February, March and April preceding Conference the General Secretary and National Honorary Secretary must be invited to attend the monthly committee meetings of the AGM Committee.

The following headings are set out for the general guidance of the AGM Convener and his Committee.

10.2 AGM Registration

It is the duty of the Convener to organise facilities for voting delegates to register from the Opening day to the Saturday of Conference. It should be remembered that registration facilities up to Friday night will take place in one venue close to Conference registration and will then need moving for Saturday to the actual venue of the Annual General Meeting if that is different.

Until Saturday it is sufficient to have two desks or booths numbered 1-600, 601-1275 (or the largest Table number issued) manned by two or three people in the registration area and these teams should be rotated fairly frequently in order to give everyone the opportunity of familiarising themselves with their duties. This will enable them to cope with the rush on Saturday morning.

The registration desks for Saturday morning must be able to cope with a rush of the majority of voting delegates and will need clear numbering, normally four tables or booths numbered 0-300, 301-600, 601-900 etc., up to 1275. These must be clearly signed so as not to cause confusion with Conference registration. A separate information desk is desirable.

Registration on the Saturday morning should commence at 8.00 a.m. and admission to the arena allowed from 9.00 a.m. The time of lunch will be decided by the National Honorary Secretary, with the National President, and usually lasts for 1 hour. This may vary on the day depending on the progress of the AGM agenda.

The General Secretary must be given the numbers of delegates registered so far on or about 10.00 a.m. on the Saturday morning of Conference and again after registration has closed at 12.00 noon.

Early contact with the General Secretary is important as details of procedures etc., and all aspects of registration will be provided by him to the AGM Convener during January. Other items as detailed under "Instructions for Registration", including numbered envelopes, etc., will be delivered to the AGM Convener on or before the Tuesday before the AGM by the General Secretary.

10.3 AGM Layout and Platform

The physical requirements for this will vary depending on whether or not the venue is a tented complex or fixed site. In general the duties entail the complete layout of the Top Table and Stage together with permanent seating for the voting delegates and all other observers.

The Top Table will be in three sections in a crescent shape with the middle one long enough and large enough to seat five persons who will have varying degrees of paperwork, briefcases etc. The National President must be able to gain access to the front of the Top Table easily in order to make presentations etc.

Behind the Top Table there will be room for the National Trophies to be displayed on a table. There must be a clear walkway of at least 30 inches in front of the Top Table and some plants or flowers should be provided to decorate the front of the stage. The General Secretary sits on the President's left and the National Honorary Secretary on his right. The remaining places have no defined sequence and place labels are arranged by the General Secretary.

The move to a more professional "set" for the AGM should be noted and the stage design and layout should be planned and agreed in conjunction with the National Honorary Secretary and the General Secretary

It should be noted that the Presidential Chair, Footstool and Lectern together with the speakers' podia are stored at Marchesi House and brought to Conference by the Sales Administrator. The speakers' podia will need to be situated one to each side of the Top Table and Stage and must be clearly visible to the President.

Each Speaker's Podium is controlled by lights of red, orange and green which are wired to switches placed in front of the National Honorary Secretary who is therefore able to control the duration of speeches at the AGM. A telephone or radio link, preferably with a headset, should be provided between the National Honorary Secretary and the sound platform.

There should be at least 8 microphones available for the Top Table including the provision of a standing microphone and lapel microphone for the President. Stage sound speakers should not obstruct access to the stage or the view of speakers, delegates and the Top Table

The Top Table must be provided with an ample supply of water jugs, glasses, mineral water and fruit juices.

A table should be positioned behind the General Secretary's chair for the provision of trophies, prizes, etc., which are to be presented during the day.

Approximately 500 seats should be provided for voting delegates, Area Chairmen and International Guests. It is advisable that seating for 200 observers is provided. The Speakers' podia must be readily accessible to delegates and observers.

IMPORTANT

It must be remembered at all times that the entire area where the Annual General Meeting takes place is a no smoking area and must be kept free of food and alcoholic drink. This rule must be **strictly observed**. Arrangements must be made to avoid noise from adjacent areas such as bars etc., during the meeting. The President reserves the right to close noisy areas, but would never wish to exercise that right.

Within the voting delegates enclosure the entire front row of seats must be reserved on a permanent basis for the International Guests and the recipients of prizes, awards etc., and in addition there may be the necessity to provide seating, discreetly, for the partners of members of the National Executive and Officers to watch the proceedings for the handover of Office.

If the venue for the AGM is provided by a tented complex it may be necessary that the area for the AGM be laid out after the Presidential Ball and a seating plan and more than adequate arrangements for the physical setting out of the seating must be drawn up well in advance. It is advisable that a member of the Committee undertakes this responsibility and forms his own sub committee with additional manpower as it is unlikely that the Presidential Ball area will be clear much before 2.00 a.m. Teams of individuals will be needed to clear tables, chairs and litter and then to section off and layout the seating for the AGM. This will include all seats for voting delegates and observers. The seating layout together with the number and width of gangways must be agreed in advance with the local fire officer, it is advisable that the member of the committee dealing with this task sets up an early working relationship with the fire officer.

At the finish of the meeting additional manpower will be needed to dismantle seating, tables etc., and to arrange tables and chairs for the final night party, if that event is to take place in the venue of the Annual General Meeting.

10.4 AGM Organisation

The current National Rules require 10 Tellers and 5 Scrutineers (plus some spares) although this may be revised. They should be enlisted either from observers at the AGM or from a local 41 Club by prior invitation. A list of their names must be given to the National Honorary Secretary at the start of the AGM if not before.

At least 14 ballot boxes may be necessary for use during the meeting. The siting of these is the responsibility of the AGM Convener or his committee and they will be brought from Marchesi House by the Sales Administrator. A secure and confidential area must be provided for the counting of the votes and must be well stewarded. The number of boxes required will be notified by the General Secretary and when the voting boxes are in situ they must be in sight of the President, National Honorary Secretary and General Secretary. Voting for the election of National Officers will commence immediately after the conclusion of the Vice Presidential addresses and will close exactly at noon.

In addition to the secure area provided for the ballot boxes and scrutineers, a further area for the use of Vice Presidential candidates whilst other candidates are making their address, must be provided. This will also require an additional sound system in order that the individual candidates cannot hear their competitors' speeches. (A motor car has been used in the past)

Two of the ballot boxes must be available at all times during the late morning and afternoon sessions in case a ballot is requested on any resolution.

10.5 Committee Duties and Liaison

An efficient Minute Secretary is important for the AGM Committee Meetings. The General Secretary and/or National Honorary Secretary will usually attend these meetings.

Minutes must be circulated to all members of the Committee as soon as possible after the meeting and it must be stressed that duties undertaken in those minutes must be completed before the commencement of the next committee meeting. It is also advisable during the AGM that the Minute Secretary acts as one of the Top Table stewards in order to provide an efficient liaison between the National Honorary Secretary, General Secretary and Stewards or other interested people within the Annual General Meeting.

10.6 Posters and Signs

Depending on the overall size of the venue, posters or signs in greater or lesser numbers will be required. This task should be delegated to a committee member, and the placing of the specific signs should be included in the overall seating and area plan for the meeting.

The need for signs will vary but a general guide would be:

No Smoking - at all entrances

No Food or Drinks in the AGM - at all entrances

Please switch off all Mobile Phones – at all entrances

Reserved - cards for chairs at least 100 needed

Voting Delegate Registration

Labels for Ballot Boxes - names of individual positions (provided by General Secretary).

Care should be taken to ensure that there are adequate direction signs to enable delegates and observers to move easily around the venue without causing bottlenecks or traffic jams.

It is suggested that there is liaison with the Venues Convener, as if he is providing signs for the Social Functions etc., this can be carried out at the same time.

10.7 General

The General Secretary and the National Honorary Secretary will require transport to the AGM from the Headquarters Hotel at 7.00 a.m. on the morning of the AGM. The vehicle should be an estate car or larger to accommodate various boxes, etc.

It is important to provide a breakdown program following the cessation of the AGM and Conference so that all loaned items are dealt with and returned.

The use of a radio for the duration of the Conference is important. It is not sufficient to have one for the AGM only.

It is important to remember that the smooth running of the entire AGM is vitally important to the President and for the good repute of the Association. It goes without saying therefore that instructions from the President, National Honorary Secretary, National Conference Convener or the General Secretary should be acted on promptly, pleasantly and as quickly as possible.

The entire proceedings for the Annual General Meeting are carried out to a strict timetable and it must be borne in mind that whilst the AGM Convener will receive all necessary information he is not in a position to approve or give authority for individual interruptions or other activities. The approval for any such events can only be given by the National Honorary Secretary and he must be kept fully informed at all times of any information you may receive concerning these activities prior to the commencement of the AGM

In view of the numbers attending, the AGM needs to be well stewarded, particularly in the delegate areas and the doorways and gangways by well briefed stewards. The AGM Convener must accept that within the confines of the AGM venue all stewards, their operation and delegation, come under his direct control and he must therefore be able to act accordingly.

A close liaison should be maintained at all times with the Venues Convener, Catering Convener, Sound Engineer and Fire Officer to ensure that all requirements, particularly relating to Safety, are explained, understood and agreed to before the commencement of the Annual General Meeting.

A more than adequate sound system must be provided in consultation with the Entertainments Convener. On the day of the AGM the activities of the sound tower and sound engineer will be directed by the National Honorary Secretary, and the sound engineer must provide facilities for the entire proceedings of the Annual General Meeting to be recorded on standard cassettes. The system must be capable of handling both speeches and music at various levels of volume and provide a recording of acceptable quality throughout.

In addition, given the increase in the number of PowerPoint Presentations, an appropriate projector capable of back projection together with a suitable screen is required. The design of the AGM stage must allow scope for an integrated Sound/Vision presentation to be made.

Remember to liaise with the Catering Convener to ensure that lunch and refreshments are provided for the National Executive and guests including Past Presidents, as this will need to be undertaken separately from the general provision of food for delegates and observers.

Arrangements must also be made for tellers and scrutineers to be fed and watered.

NATIONAL ASSOCIATION OF LADIES' CIRCLES

OF GREAT BRITAIN AND IRELAND

(issued by NALC Headquarters Office, Keighley)

CONFERENCE MANUAL

THIS BOOKLET GIVES DETAILS OF LADIES' CIRCLE'S CONFERENCE REQUIREMENTS AND NALC's ROLE IN THE ORGANISATION OF CONFERENCE. IT IS INTENDED TO HELP MEMBERS OF THE LADIES' CIRCLE AREA TO BE AWARE OF WHAT IS EXPECTED OF THEM.

Amended June 2000

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This manual gives details of the involvement of Circlers in the organisation of the National Conference. If any further information is required, please contact the Association Secretary at Headquarters Office, Provincial House, Cooke Street, Keighley, West Yorks. BD21 3NN, Tel. 01535 607617, Fax. 0535 662312, E-mail mary@ladies-circle.org.uk

PLEASE READ THIS MANUAL CAREFULLY BEFORE GOING AHEAD WITH YOUR PLANS

NALC FUNDS MUST NOT BE COMMITTED WITHOUT THE PRIOR AGREEMENT OF THE NATIONAL EXECUTIVE.

1. STRUCTURE OF CONFERENCE COMMITTEE/SUB-COMMITTEES ETC

a) NALC National Conference Convenor

The National Immediate Past President of NALC serves as a member of the National Conference Committee, with full voting rights, to represent the interests of Ladies' Circle at national level. She attends meetings of the Conference Committee organising the Conference and other Conference Meetings as required. She attends all the Conference submission meetings and as part of the National Conference team, she plays a part in deciding where national conference will be held.

b) Ladies' Circle Conference Liaison Convenor

A Circler from the host Conference Area will serve as Ladies' Circle Conference Liaison Convenor. She will also serve as a member of the main Conference Committee to look after the special requirements of NALC at Conference and to co-ordinate the activities of Circlers in the host Area. She is NALC's chief representative regarding conference at local level.

A panel of National Executive Members and an appointment made will interview Approx two years before the Conference takes place, members of the host Area will be invited to send in applications for this position and candidates. Candidates must be active Circlers until the end of the national conference in question. The LC Conference Liaison Convenor will undertake all duties in connection with the Conference at local and Area level and she will liaise closely with the NALC Conference Convenor and the Association Secretary.

The uniform worn by the LC Conference Liaison Convenor will be paid for from Conference funds. The LC Conference Liaison Convenor will receive expenses from the Conference Treasurer on the same scale and by the same methods as the other members of the main Conference Committee. She should seek clarification of the expenses allowed/systems for claiming payment, from the Conference Treasurer.

She will be the guest of NALC at the National Council Luncheon and the National AGM Luncheon. It is recommended that the Ladies' Circle Conference Liaison Convenor does not undertake any other office in Circle during her term of office as Conference Liaison Convenor, except that of Immediate Past Circle or Area Chairman.

c) Circlers who serve as Conference Convenors

Other Circlers may submit their names for consideration as Convenors on the main Conference Committee. The Conference Chairman will provide details of all convenorships available. Appointment to the Conference Committee is the responsibility of the Conference Chairman and any Circler who serves as a Conference Convener will have the same status and receive the same expenses etc as her Round Table counterparts. Circlers serving, as Convenors should preferably be active members until the end of the national conference in question.

d) Involvement of other Circlers in the organisation of Conference

NALC does not have a separate conference committee, but one Circler will serve on the Conference Stewarding Committee to assist with the provision of manpower for the Conference generally and specifically to organise Stewards for the National AGM and other Ladies' Circle events held at Conference. She will work closely with the Association Secretary of NALC in this respect. A second Circler will serve on the Conference Sales/Promotion/Publicity Committee, to generally assist but with special responsibility regarding the provision of promotional sales items for Circlers and to liaise with NALC HQ Sales Department regarding the NALC shop at Conference.

All Conferences will actively seek the help of as many Circlers as possible on their sub-committees and, in which case, the RT Conference Chairman will seek the assistance of the LC Conference Liaison Convener in finding volunteers.

Circlers and Tablers who serve as members of Conference Sub-Committees are not entitled to claim expenses or wear a convenor's uniform, although some sub-committees do have their own T-shirt, sweat shirt etc. but this is at their discretion. The aim should be to keep out-of-pocket expenses to a minimum by sharing car journeys, holding meetings in homes etc. However, the Circler serving on the Stewarding Sub-Committee may be required to undertake some travel on behalf of NALC to visit Circles, AGM venue, etc and a claim for essential travel expenses may be made by her to the NALC National Treasurer, mileage to be based on current scale of allowances paid to National Council and National Executive.

e) Site Visits

When the LC Conference Liaison Convener has been appointed, she should contact the Association Secretary to arrange a date for them to visit the venues suggested for the National AGM, other National Meetings and HQ Hotel. The Association Secretary will visit the Conference venue on other occasions as appropriate.

f) President's ADC

Some Conferences may wish to appoint a Circler to be the President's ADC during the Conference. Often the current Area Chairman undertakes this task which gives her an involvement with Conference which is not too onerous.

Summary

The host area is encouraged to participate in the Conference organisation at all levels and to take the opportunity to work with Round Table for the benefit of both Associations and the Conference as a whole.

2. AREA CHAIRMEN'S AND VICE CHAIRMEN'S PROMOTIONAL WEEKEND

A promotional weekend is held in the autumn to 'sell' the conference to RT Area Vice-Chairmen and LC Area Chairmen. Circlers who are members of the conference committee would be expected to participate in the weekend.

3. CONFERENCE HEADQUARTERS HOTEL

At some Conferences it may be possible for a joint RT/LC Headquarters hotel to be organised but on other occasions each Association will have their own hotel. It is customary for the National Executive, VIP guests, staff etc. to stay at the Headquarters Hotel, and the LC Conference Liaison Convener would also find it convenient to stay at the HQ Hotel. The Conference Treasurer will pay her expenses for accommodation. Other Circlers who choose to stay at the HQ Hotel will be responsible for their own accommodation expenses.

When the HQ Hotel is a joint RT/LC hotel, special arrangements will apply regarding booking forms etc. and instructions will be given at the time. If NALC organises their own HQ Hotel, bookings will usually be made via NALC Headquarters Office who will liaise directly with the hotel regarding their requirements.

Where possible the HQ Hotel or Conference venue will have rooms available for use as a Board Room for National Executive Meetings, a large meeting room for the National Council Meeting on Friday morning, and a private dining room for the President's Dinner on Saturday evening (for approximately 25-30).

4. HIRE OF ROOMS

NALC pays a contribution to Round Table each year in respect of venues required. The amount is agreed with the RT National Conference Convenor beforehand and paid from NALC funds.

Expenses in connection with the hire of special equipment, catering etc, for any meeting which does not form part of the Conference programme i.e. the National Council Meeting, National Executive Meetings and National AGM is the responsibility of the Association Secretary on behalf of NALC and the National Treasurer will be responsible for payment of any charges.

5. ANNUAL GENERAL MEETING

The Annual General Meeting is not a Conference function but a national meeting open to all members, which is held during Conference week. The AGM is strictly governed by NALC standing orders and the constitution; therefore arrangements are the responsibility of the Association Secretary acting on behalf of the National Executive. However, the smooth running of the meeting depends upon the co-operation given by the LC Conference Area, particularly the Circler who serves on the Conference Stewarding Committee.

A Circler from the host Area will be required to act as Platform Secretary, and another to serve as Minute Secretary. The meeting commences at 9.00 a.m. and ends at approx. 5.00 p.m. Members are admitted from 8.00 a.m. and stewards report for duty at 7.30 a.m.

Lunch facilities need to be available for members attending the AGM and the form this takes can vary from year to year according to the Conference venue. A separate luncheon is held for the Association's VIPs, and this should include a glass of wine/juice to be available for guests as they arrive at the lunch. The Lunch Break lasts for one hour.

a) Guests

The Association Secretary will invite the Association's Patron, the Civic Representative, Past National Officers of NALC and all other special guests, to attend the AGM.

b) Interruptions

The Conference Committee usually interrupts the meeting to introduce themselves to members. Other interruptions might also be planned and it is essential that the Association Secretary is informed of these beforehand in order to arrange a suitable time so the smooth running of the meeting is not affected.

c) Minute Secretaries

The organising Area will be required to provide a Minute Secretary to take accurate notes during the meeting. She will be required to attend the meeting from 8.30 a.m. until the end. A member of HQ Staff will also be present to act as a second Minute Secretary and the meeting is also recorded on audiotape. The Association Secretary prepares the official minutes of the meeting from the notes of the Minute Secretaries and the recording.

d) Stewarding

Full details of stewarding requirements are set out in a separate leaflet that will be issued later. It is crucial that a stewards briefing is held at the AGM venue shortly before the AGM, to outline the duties of the stewards and familiarise them fully with the proceedings.

6. PRE-REGISTRATION DESK

Each Circle may send two delegates to represent them at the AGM, one of which is their voting delegate and the second the accompanying delegate. These Circlers may register prior to the start of the meeting on Saturday morning, or from the time Conference officially opens. A Pre-Registration Desk will be required to be set up close to the main registration desk and stewards will man the desk throughout the week. The Association Secretary will provide the register, tickets, cards etc. along with full instructions.

If a Circle is unable to send their own voting delegate they may appoint a proxy delegate to act on their behalf. Full instructions regarding procedures for proxy delegates are issued beforehand but proxy delegates may register along with all other voting delegates.

7. JOINT RT/LC PRESIDENTS' BANQUET

A joint RT/LC Presidents' Banquet is held during Conference, followed by a Ball. The format of the evening will be agreed between the two National Presidents and the LC Conference Liaison Convenor will be given instructions for any special Circle input required.

8. NATIONAL COUNCIL MEETING

A National Council Meeting is held on the Friday morning of Conference week, commencing at 8.30 am, and ending at approximately 12.30 pm. The National Executive, Area Chairmen and observers attend the meeting. The administration of the meeting is the responsibility of the Association Secretary on behalf of the National Executive. The meeting takes place in the NALC HQ Hotel or the Conference venue, and stewards are required to take care of nominees and generally ensure the smooth running of the meeting. The LC Conference Liaison Convener and the Steward in charge of Circle stewarding should steward the meeting, together with the following year's LC Local Conference Convenor. A Luncheon follows the meeting, which is attended, by the National Councillors and Area Vice-Chairmen. The Association Secretary is responsible for arranging the luncheon, in liaison with the LC Conference Convenor.

9. CONFERENCE SALES ITEMS/NALC CONFERENCE SHOP

The Conference Sales Committee has responsibility for matters relating to conference sales. The Conference Sales Convener will liaise with the LC Conference Liaison Convener to find some items suitable as promotional sales items, which will bear the LC logo. These will be purchased by funds from the Conference budget and all profits will revert to the RT Conference budget. It is customary for a LC Conference badge to be offered as a sales item and these are usually popular, but additional items will vary in nature from year to year.

Before LC Conference sales items are ordered the NALC National Executive must approve them and they must bear the Circle marketing logo. Samples or details should be given to the Association Secretary at the earliest opportunity so she can seek approval from the National Executive. These items are offered for sale at the Conference prior to your own and throughout the year leading up to conference, with remaining stocks being sold off at your own Conference.

The NALC Shop based at HQ Office in Keighley moves to the Conference venue and opens for business at the beginning of Conference, remaining open throughout the week and on the day of the AGM. Several special sales items are introduced by NALC for sale during Conference in addition to normal stock items. The Conference Shop is the responsibility of the National Sales/Regalia Officer, who is responsible for sending the stock to conference, and the operation of the shop on a daily basis (banking, stock control etc throughout the week) is carried out in liaison with the LC Conference Liaison Convener. The LC Conference Liaison Convener will also be required to liaise with the Sales/Regalia Officer to assist as required and to provide manpower for the daily running of the shop. The NALC Sales/Regalia Officer must be consulted in advance of Conference, regarding the siting of the NALC shop.

10. STEWARDING

Stewarding plays a very important part in the smooth running of the Conference. In addition to duties carried out on behalf of NALC, the LC Conference Liaison Convener may be asked to provide stewards for the social functions held throughout Conference week. She will liaise with the Conference Stewarding Convener, who will ascertain the number of Circlers/Tangent members required to steward throughout conference and allocate their duties accordingly.

Ladies' Circle will require stewards chiefly for the AGM (please see separate stewarding guidelines document re numbers required). Stewards will be on duty at the AGM venue from approximately 7.30 am until approximately 5.30 pm. Any member who is able to steward for even a short time during the meeting should be encouraged to do so.

11. TRANSPORT

The National Executive, guests, committee and husbands/partners, will require transport to functions throughout conference. Mini-buses or courtesy cars are usually provided and a car with driver is put at the disposal of the National President. A list of transport requirements should be drawn up by the NALC National Conference Convenor, in conjunction with the Association Secretary, and given to the Conference Transport Convenor. A large van will be hired to transport items required for meetings etc. If the NALC AGM venue is not on the main Conference site, transport will be required to move shop stock, AGM boxes etc to the AGM venue on Friday afternoon.

12. VIPs

The International Contact Lady informs the President or Vice-President of LC in all the full member countries of LCI of the date and venue of the AGM and Conference, and of the process by which they should book, if they wish to attend. The President of Ladies' Circle International is also invited to attend at her own expense, unless it is her official year to tour GB&I, in which case she will be hosted by NALC. In addition, the Association Secretary sends invitations to the Presidents of the Tangent Association and the President of Inner Wheel.

VIPs will arrive at Conference throughout the week and it may be necessary to arrange to meet them at railway stations or airports. The Association Secretary will provide details.

Guests will accompany the National Executive to social functions held in the evening. The LC Conference Convenor is responsible for registering VIP guests with the Conference Registration, and for ensuring that their conference packs/tickets etc are available at their hotel, prior to check-in. It may also be a good idea to appoint a Circler to make sure the guests are looked after properly. This is another job that could be undertaken by the Area Chairman.

13. NOTICES/SIGNAGE

The official embroidered banner of the Association will be brought from HQ and will be displayed on the platform at the AGM. NALC will require specific signage for Conference. The LC Local Conference Convenor should liaise with the Association Secretary on these requirements.

14. ADVERTISEMENT IN 'THE CIRCLER'

Conference is allowed space, free of charge, in the two magazines published prior to their conference. A Conference logo is usually designed by the Conference Committee that must incorporate the Circle marketing logo and this can be used in both adverts without cost. Artwork and copy should be submitted to the National Media and PR Officer by the deadlines required - details of which can be obtained from the Media and PR Officer.

The Conference Booking form produced by the Conference Committee may also be inserted into the autumn edition of The Circler prior to the Conference. The booking forms to be provided by Conference Committee and sent to the magazine printer by the agreed date but they will be inserted into the magazines at the expense of NALC. The LC Conference Liaison Convenor should liaise with the National Media and PR Officer regarding this.

15. CONFERENCE BROCHURE

The Conference Committee sometimes publish a Conference brochure for circulation at the Conference, and often a brochure is published by the following Committee to promote their own Conference. Copy and photographs may be required from the LC National President/Vice-President for inclusion in these brochures. The LC Conference Liaison Convenor should liaise with the Conference Committee about this and ensure that requests for material are made in plenty of time.

16. NALC HQ STAFF

The Association Secretary and Office Manager attend Conference, and a computer and printer should be available for their use, and that of the National Executive, during the whole of Conference week.

17. ADMINISTRATION

The LC Conference Convenor should ensure that copies of all documents in relation to Conference, particularly concerning bookings, letters to hotels, venues etc, are retained on file, and are available whenever required.