

FINANCE /TREASURER COMMITTEE

A. Bank Account & Accounting System

Set up a checking account for the Regional Meeting or National Convention. Use the name of the Event and the Finance Chair's address on the account. At least one other Event Official should be included as a signatory on the account; suggestions are the General Chair or a Host Chapter President. Your bank will require you to provide an Internal Revenue Service (IRS) Employer Identification Number (EIN). For a Regional, it would be wise to ensure that the not-for-profit status of the host chapter is in accordance with IRS regulations.

The account mailing address should be that of the Finance Chair or Host Chapter's post office box.

For a Regional, a suitable amount may be borrowed from the Host Chapter's treasury to open the account and pay initial expenses. For a National, the initial expenses will be funded from the NAWCC, Inc operational accounts by providing budgeted seed money to the National Convention account. This money should be returned to the Regional Host Chapter's treasury or to the National operating account when sufficient funds have been received or at the conclusion of the Regional Meeting or National Convention.

Some Regional Meetings also solicit contributions of "seed money" from co-host chapters.

The Finance Chair should create and maintain an accounting system with a receipts journal and a disbursements journal.

Recommended System:

Acquire a rubber stamp for endorsing checks that indicates:

- For Deposit Only
- Account Number
- "XYZ" Regional Meeting or National Convention Fund

Use this stamp to endorse all checks received. The line on the stamp, "For Deposit Only," is a valuable protection, since a lost or stolen check so stamped cannot be exchanged for cash at any bank. Use this same procedure for checks received during on-site registration.

The bank will send statements to the Finance Chair, who can ensure current financial status and maintain good accounting procedures

D. Checks & Deposits

Checks for expenditures may be signed by the Finance Chair or the General Chair. For extra security, it is recommended to require both signatures on checks over \$1000.

The Finance Chair must maintain close communication with the Pre-Registration and Registration Chairs. Pre-Registration money should be deposited at least weekly.

For security, cash on-site during the Event should be kept to an absolute minimum. Check with your hotel and/or convention facility to determine whether they have lock boxes available. If so, you may consider using these, because they can relieve the Finance Chair of much of the responsibility of transporting and securing cash.

Receipts

The Finance Chair should insist that all Event Committee Chairs turn in receipts promptly.

At the conclusion of the Event, the Finance Chair must make sure that all receipts are turned in and all expenses are paid in a timely manner, preferably within two weeks.

New Memberships & Renewals

Memberships collected at the Event should be forwarded to Member Services at NAWCC, 514 Poplar Street, Columbia, PA 17512 within five (5) days after the Regional Meeting. The original (first part) of the three-part Membership Application should be sent along with the appropriate membership dues payments.

PRE-REGISTRATION / ON-SITE REGISTRATION COMMITTEE

Ultimately, the success of any Event is directly dependent on the number of attendees and their judgment about how well they were treated before and during the event.

Experience shows that if an attendee is unhappy this year, that attendee may have a negative effect on your success in subsequent years, because an unhappy attendee is likely to communicate unhappiness to other attendees and prospective attendees, negatively influencing their decision to attend future Regionals.

As a result, what the Registration Committee does is critical, and the Registration Committee should work closely with the Publicity Committee.

A. Registration Process Summary:

The Registration Committee's duties are to process and acknowledge registrations (Registration Form), maintain a record of registrants (attendance number, names, NAWCC number, type of package purchased, number of mart tables purchased, options purchased, etc.), prepare registration packages prior to the meeting, process on-site registrants at the meeting, and forward funds to the Finance Committee Chair on a timely basis. Importantly, the process must include the Waiver of Liability and Event Rules. This applies to Pre-Registration and On-Site Registration. (See RMG Appendix O – Waiver of Liability and Event Rules.). Many Events have found it convenient to include the Waiver of Liability statement in fine print on the Registration Form, and post the Event Rules at the entrance to the Event. A Sample Registration form is in RMG Appendix P.

B. Pre-Registration vs. On-Site Registration:

There should generally be two “Co-Chairs” for the Registration Committee: Pre-Registration and On-Site Registration. Statistics show that 40 to 60 percent of attendees pre-register for an Event.

Experience indicates that maximizing Pre-registration is desirable for a number of reasons:

- It avoids the problem of long lines waiting on-site.
- It provides more time to handle registration tasks, thereby reducing stress and the potential for errors.
- It gives Event organizers a better idea of the number of attendees to expect and what steps to take to ensure convention events proceed smoothly.
- It provides a larger initial bank account, making it easier to handle expenditures.

C. Record Keeping:

Use a ledger book, some form of a Registration Worksheet with a running balance of monies collected or a computerized registration system showing each registrant's name, registration number, NAWCC number, functions requested, and amount paid.

Computerized and Internet Registration: A computerized registration system is available from NAWCC Member Services for use at Events. Contact NAWCC Member Services for the specifics and equipment requirements. NAWCC also offers assistance in setting up Internet-based online pre-registration, including acceptance of payments by credit card. Contact NAWCC Member Services for details about this system.

D. Pre-Registration Cutoff:

The cutoff date for pre-registration should be kept to a minimum, about one to two weeks prior to the Event depending upon the systems and process being used. The cutoff precludes problems with late delivery of mail, allows the registration chair to complete paperwork before the Regional, and gives the registration chair time to prepare for the on-site registration process.

E. Registration Fees:

Maximizing pre-registration is at least partly a function of admission fee structure. Many Events charge a higher amount for on-site registration than pre-registration. The additional registration fee for on-site registrants should be clearly stated in the published registration form. If this differential is large enough, it provides an incentive for attendees to pre-register. At the same time, if the differential is too high, prospective attendees who are unable or reluctant to pre-register may decide not to attend at all.

F. Refund Requests:

Understand that some pre-registrants may be prevented from attending your Event. Some groups accept refund requests through a certain date in advance of the event, while others honor refund requests – within reason – all the way through the event’s completion. If there is a cutoff date for refund requests, it should be clearly stated on the registration form. Just as with the fee differentials mentioned above, your attitude toward refund requests can have an effect on the pre-registration/on-site registration ratio. An easygoing approach to refunds means attendees have little to lose by pre-registering (and reserving tables) and are more likely to do so.

Refund requests with “a good excuse” should probably be honored, especially in consideration of the bad will a refusal might create especially if the request was provided well in advance and, in the case of table holders, did not impact the ability to re-sell the tables. As a rule of thumb, most businesses believe a happy customer tells no more than one or two others about their experience, while an unhappy customer is likely to communicate that unhappiness to at least seven others.

As you will see in Section 6 of the Regional Meeting Guide, “Determination of Registration and Mart Table Fees,” it should NOT be your objective to maximize income from a Regional Meeting. Accordingly, it is not in your best interest to punish pre-registrants who are unable to attend by adopting a "hard and final no refund rule".

G. On-Site “Rush” Period:

Registration Chair and Committee members staff the Registration desk. Enough qualified people should be available at all times. The busiest time will be when registration first opens, and you must have enough help at this time. The Registration Chair should act as a roving troubleshooter.

If registration tasks are divided between pre-registration and walk-in registration, the Pre-Registration Chair should be available at or near the on-site registration area to provide continuity and to handle registration issues that sometimes surface during the “rush” registration period. Because resources (and tempers) may be strained during on-site registration, it is best to have too many rather than too few volunteers on hand.

Remember, especially in the heat of the moment during the initial on-site rush, that all the people waiting in line are “customers” and deserve to be treated as well as possible. First impressions are lasting impressions especially for new members and non-members.

H) Registration Requirements and Restrictions:

Pre-Registration for Regional Meetings and National Conventions is limited to NAWCC members, their partners, and children under 18 years of age. Attendees must show a valid NAWCC membership card when picking up registration packages or registering on-site. Others, including Escorted Visitors and Public Day attendees will need to be dealt with by the Registration Committee on-site during the event. Escorted visitors have no member rights.

I) New and Reinstated Members:

Applications for new NAWCC Members, including Regular, Introductory, Business, Student and Youth memberships may be completed and paid for at the on-site Registration Desk. Some form of federal or state picture ID is required. Reinstated members must pay full annual dues and complete the Membership Application. A packet of Application forms will be supplied by Member Services prior to the Event. Ensure that all Registration volunteers are familiar with membership categories.

The Registration Chair must send applications and payments for new and reinstated members to Member Services at Headquarters within five (5) days of the close of the Regional Meeting.

J) Non-Members (Escorted Visitors, Public Day): See Attendees Classification in Section 1 of the Regional Meeting Guide.

K) Tableholder Location Requests:

Some table holders will request specific table locations. If the request is made early enough, you should try to accommodate the table holder. Table holders also frequently request that their tables be next to those of a friend. The best way to handle this is to insist that both table holders send in their registration requests in the same envelope or register online at the same time. Put a notice to this effect on all your registration information.

L) “Early Bird Registration”:

Some Events feature “Early Bird” registration fees that permit attendees to engage in trading prior to the Mart’s official opening. If you wish to try this approach, bear in mind that the fee needs to be slightly less than the price of a table. Otherwise, “Early Birds” need only buy a table for themselves to accomplish the same goal.

M) Membership Confirmation:

An integral part of pre-registration is confirming NAWCC membership numbers for all prospective attendees. If you use the NAWCC “in-the-cloud” registration program, this process is automatic. If using the NAWCC downloadable software, you must have loaded into the program an up-to-date membership list, which will be supplied by NAWCC Member Services upon request. If you do not use either NAWCC supplied registration programs, you will need to obtain a list of current members from Member Services to check membership numbers. Member Services will automatically supply a list about one week prior to the Event. Contact Member Services for any special requests.

N) Confirmation Letters:

Confirmations for pre-registration should be provided within a reasonably short period of time. The confirmation may simply be a photocopy of the registration form, a letter, an email, or other suitable notice that the registration fee has been received and accepted. Clearly state any “balance due,” along with instructions for payment. Confirmations are important to attendees, assuring them that their registration and fees have been received. It is suggested that you put a notation on the registration form and/or the Event website advising when attendees can expect to receive confirmations.

Special instructions regarding opening times for Registration, the Mart room, and Mart table unloading and/or setup, directions to the hotel, etc., should be included with the confirmation notice. Because it is possible to put about four sheets of paper into an envelope and still pay only for one ounce of postage, make sure you use this opportunity to promote other activities at the Regional (e.g., Public Day [if offered], exhibit, programs, auction, etc.).

O) Registration Programs:

A computer registration system is needed. Such a system should be capable of printing “last-minute” tabulations of pre-registration data for the on-site registration activity. At least one alphabetically sorted list of pre-registrants is needed for each person working at on-site registration. Sharing a single list wastes everyone’s time. Additional lists of Mart table holders – sorted by table number and in alphabetical order – are also invaluable to Mart Committee members during setup and should be deposited at Mart Central for use by attendees during the meeting. Other advantages of using the NAWCC computerized registration systems include fast verification of membership numbers and the ability to print:

- 1) Personalized confirmation letters
- 2) Registration name badges in large font sizes
- 3) Mailing labels for confirmation letters
- 4) Registration package labels with special notes

P) Registration Packets:

The Pre-Registration committee should prepare registration packages in advance. These should contain, at a minimum, registration badge(s), ribbons as appropriate, tickets for special functions, a program (one for each attendee). Some events, depending upon workload, provide only a badge upon registration and have easily accessible holders, programs and other materials in a self-serve, take what you need, manner.

A typical Registration Packet might include the following items. Note: If a registrant has included a partner and/or children, the packet should include a program and pertinent information for each adult registered.

- 1) Registration Badge: Suggested 4" w x 3" h with plastic jacket and safety closure. The name of the meeting, location, and date should be printed on the badge. The person's name, registration number, and city and state, or state only should be typed on the badge. Be sensitive to the first name the registrant uses commonly.
- 2) Badges with an elastic string that allows them to hang around the neck of the attendee are preferred because they are easily seen by security staff. Badges should be printed or typed in large letters (font size 16 to 22). Upper/lower case in a bold font is generally more readable. Badges may be stapled to the plastic jacket to prevent them from falling out.
- 3) Replacement Badges: You may decide to charge a fee for replacing a lost badge. The second badge should be marked "duplicate." Keep a log of names and NAWCC membership numbers of those who lose their badges. Some are not above claiming to have lost a badge to gain admission for someone else who is either unqualified or unwilling to pay the required fees.
- 4) If you permit Mart table holders to enter the mart room for unloading and setup, use a different color badge or special marking on the badge to identify them. These should be distinguishable from the badges of non-table holders. The same goes for "helpers," if you permit them. The same applies for "Early Birds." These special badges allow security to correctly identify those allowed into the mart during setup.
- 5) Ribbons (optional), signifying National Officers and Directors, Past National Presidents/Chairs, Regional Committee Chairs, Host Chapter Officers, Old Timers, Fellows, Star Fellows, and Program Speakers may be attached to badges. If no other ribbons are offered, Program Ribbons should be used. It is suggested that you have an extra supply of ribbons for those who might not have previously indicated they needed one.
- 6) Schedule of Events, Mart schedule, and Auction Rules.
- 7) Tickets: Banquet, Special Activities, and Tours
- 8) Door Prize Ticket (optional): Numbered ticket or badge registration number may be used.
- 9) Brochures and Flyers regarding local attractions, entertainment, NAWCC brochure/application to pass to a friend, etc.
- 10) Favors, for example, from material suppliers, local attractions, restaurants, etc.
- 11) Packet Labels: The NAWCC Registration Program can provide these labels. The registrant's name and registration number should be on the outside of the envelope. If the person has underpaid or overpaid the registration fee, put a note to that effect on the outside of the envelope. Attendees should pay any money owed before you give them the packet.
- 12) You will probably want to make up additional packets for the anticipated number of on-site registrants. Registration badges and applicable tickets can easily be added to these.

Information on local attractions, restaurants, and other activities of interest can be provided at a nearby table. A person knowledgeable about local attractions and entertainment may be made available near the Registration desk. The local Convention and Visitors Bureau may have a person available for this service. In some destinations the Convention and Visitors Bureau also provides assistance with the registration process. Most destinations also provide free tourist brochures.

Tips: Suppliers for name badge holders, lanyards, name badge inserts, ribbons, etc. are many and should be comparison-shopped using a cost, benefit approach. Horizontal Ribbons are attached to the bottom edge of the badge holder. The most common ribbons are Fellow, Star Fellow, Old Timer, Director, Committee or Staff. Marco has these in stock. If you need custom made ribbons, there is a set up charge and print charge. –These ribbons are generally used for Nationals and not Regionals. Clear, vinyl badge holders with elastic cord for around the neck, as well as the badge insert card can be found at any office supply store (Office Depot, Staples, Amazon, etc.)

Q) On-Site Registration

Use discretion and good judgment to resolve registration problems. Remember that attendees talk to other attendees, members, and prospective members, before, during, and after any Event. How they perceive Event officials treated them will affect what they say to others about the event and about the NAWCC in general.

It is said that some Event organizers want to “please,” while others want to “police” these events. What is best is a careful balance of both. Remember that verbal altercations taking place during registration may be witnessed by large numbers of members waiting in line. A careless remark or callous treatment of an attendee can result in creating a “bad reputation” for the Event that can hurt attendance in subsequent years.

Any questions or disputes concerning registration requirements or fees should be referred to the Registration Chair. A further ruling may be obtained from the General Chair or the National Representative.

Tips: All volunteers, including Registration volunteers, should receive "customer friendly" instructions from the General Chair and have contact information to reach the General Chair and/or other Chairs to immediately handle any issues.

Location: On-site Registration should be located in an easily accessible area. Many facilities have a permanent registration desk. Or set up the registration desk in the facility lobby or near the Mart entrance. Place directional signs to the Registration area in the lobby. Make sure the signs state when Registration is open. The Registration area should be large enough to provide space for pre-registration packets, extra registration packets, computers, printers, supplies, and a comfortable working area. Internet access is recommended if available, and is required to use the “cloud” based registration program. The Registration area often serves as a source for local information on businesses and services.

Registration Hours: Registration should open prior to the daily activities and remain open during regular meeting hours. The Registration desk may close an hour or two earlier than daily activities. Use your judgment in anticipating the traffic flow.

A large sign welcoming & directing non-members, especially if a Public Day is offered, is highly recommended.

Packet Pickup and On-site Registration Areas: Registration should be divided into two areas; Pre-Registration and On-site Registration. Both areas should have signs for easy identification. The Registration staff distributes registration packets to pre-registrants and processes on-site registrants. Registration must verify current NAWCC membership by checking membership cards or computer databases or printouts (provided from Member Services). If the member does not have their membership card and you are checking against the membership list, please require photo identification. Verification of membership can also be obtained by contacting Member Services during NAWCC business hours (Eastern Time) at (717) 684-8261.

R) Registration Forms:

The on-site registration process will be much faster if on-site registrants fill out a form listing pertinent information prior to getting into line. These forms, along with a supply of pens or pencils (suggestion: use golf scoring pencils which are very inexpensive), can be put on a table near the registration area, with a sign asking on-site registrants to fill out the appropriate form before getting into line. Suitable forms can be similar to the ones used for pre-registration or simplified versions made specifically for this purpose. Membership forms for new members and renewing members are provided by NAWCC Member Services. These should be prominently displayed along with the registration forms. If staffing is available, you may choose to have a separate desk for processing new and renewing members.

Tips: You will need 2 types of registration forms, one for 'Walk-in' and 'New/Renew'. Each of these forms can be printed 2 up on 8.5" x 11" sheet one side, trimmed to 8.5" x 5.5". Use 2 different color card stock. Supplies needed for setting up registration may include rubber bands, glue sticks, staples and stapler, markers (sharpies, broad, colors), paper clips, envelopes (different sizes), tape.