

**CANADIAN SQUARE AND ROUND DANCE SOCIETY
NATIONAL CONVENTION
GUIDELINES**

**VOLUME 2
OPERATIONS**

March 2009

i.

FOREWORD

This publication is intended to assist organizations in the planning and conduct of a National Convention. The guidelines contained herein are not intended to restrict the design of a convention, but merely to provide information on the experience of others including organizing and planning principles used in other large projects. Some principles outlined are modified due to our unique characteristics such as being a non-profit organization, staffed by enthusiastic honest volunteers.

Volume 2 proceeds from the general to the specific, and then to the final report. The overall organization and planning must be done prior to paying attention to such details as forms, badges and food. Included also are the legal requirements of incorporation, insurance and auditing.

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1-1 REGULATIONS

1. Staffing. Because Conventions are Canadian in style and character, Canadian square and round dance callers, leaders and instructors shall be featured in a National Convention. Callers, leaders and instructors from other countries may be used as guest participants at the discretion of the Hosting Organization.
2. Registrations. The sale of registrations should be promoted only in the designated local area until the start of the immediately preceding Convention. Registrations received from outside the designated local area, however, may be accepted at any time. Open and National sales should start at the preceding Convention and continue up to the Convention being hosted itself. With the concurrence of the preceding convention, a registration table may be set up and registrations taken at second prior conventions. For example, Convention 2002 set up a table at the 1998 Convention with the concurrence of Convention 2000; Convention 2004 set up a table at the 2000 Convention with the concurrence of Convention 2002.
3. Badges. The badge of the National Convention shall be the stylized red maple leaf with white lettering as specified for the emblem of a National Convention. A host city dangle designed as an addition to the maple leaf badge shall be rectangular in shape, approximately 20 by 45 mm with rounded corners, and shall contain the name of the host city and the year. The use of other shaped dangles or add-ons to the present red maple leaf badge and dangles requires the approval of the Society.
4. Auditing. Auditors shall be appointed by the organizing committee to audit the records of a Convention. The Auditor's report shall be made public through suitable methods chosen by the Society. The Society reserves the right to appoint its own auditors for any Convention. All financial records from a Convention shall be kept at least three years after the last day of dancing of any Convention.
5. Advertising. To prevent undue detracting from any other Convention, the national advertising period, i.e. outside the defined local area, for a Convention shall be from the month of April prior to the last Convention until the holding of its own Convention. Considerable local area advertising and promotion must be done by any hosting organization in order to obtain the essential interest and support of local clubs. In the event that a follow on Convention is held close to the current Convention, the two organizations shall define the limits of the local area mentioned above. If agreement cannot be reached, the Convention Coordinator in consort with the Society Board will make a binding decision.
6. Emblem. The Emblem of the National Convention shall be a stylized red maple leaf with white lettering. The actual wording layout and design shall be as Specified by the Society. The emblem sale and price is at the discretion of the Hosting Organization.
7. Souvenirs. Souvenirs should be of good quality and in good taste. The design, sale and price of souvenirs at any Convention is at the discretion of the Hosting Organization.

1.2

8. Liaison. Effective liaison is essential between Conventions-in-planning and the Society. To promote information exchange, minutes of Convention Committee meetings shall be sent to all other Conventions-in-planning and the Convention Coordinator. Lists of names, addresses, telephone numbers, and Convention executive positions shall also be forwarded for distribution and use as required by organizing committees. It is further recommended that sanctioned Conventions include Society Provincial Directors as members of their Convention Committee Society Liaison. Refer 2.3 "Suggested Organizations" - CSRDS - Provincial Directors.

Note: These Regulations are published under the authority of **By-law 16.1**

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2.1

ORGANIZATION

General

Most of us have some experience in organizing a dance. We allocate details to a small number of individuals who are responsible for programming, arranging for the hall, printing tickets and posters, arranging food, etc. Organizing a national convention is an entirely different situation.

We may have committees to look after the items above and more. Formal contracts must be negotiated. Additional areas are entered into, hotels, shops, spectators, wheelchair dancers and many others, the list goes on. The Convention Committee Chair cannot possibly know about all the detail that is going on. He/she must trust the delegated committees to do their job.

Fortunately, in square and round dancing, a great deal of trust is built in. The organization can gain by looking at how other large organizations carry out projects with a firm deadline, the planning tools they use, and the controls needed.

The organizational committee structure used is at the discretion of the host organization, however, host committees should be aware of successful organizations used in other dancing conventions.

Conventions in planning should make full use of the information available.

Final Reports of previous National Conventions, particularly the two most recent, can be invaluable for planning, budgeting and providing the latest "best guesses" on possible attendance.

The Convention Coordinator can be contacted to provide assistance in obtaining previous Convention Final Reports and other information.

The Board (Convention Committee Chairs)

The organization usually consists of the Convention Committee which sets policy and holds responsibility for operations under their respective jurisdiction. The Convention Committee should ideally consist of 9 Committee Chairs, as itemized under section 2-3 "Suggested Organization". Convention Committee members should consult "So You've Been Elected to a Committee," a series of eight articles published in Canadian Dancers News April 1984 to January 1986 and found on the Society website at: www.csrds.ca.

There will be times when rapid unilateral decisions affecting the whole convention will have to be made. A number of conventions have used a board executive usually consisting of the chair, the vice chair, and the treasurer. Some conventions have used the chair and the two or three vice chairs to form the executive. Other conventions have not used an executive at all. It is a question of making the best fit for the people that are controlling the convention.

The Working Committees (Sub-committees)

Numerous working or sub-committees are needed to run a convention and may well vary in size, job function and duties. For example, the book keeping function usually involves one or two persons, while decorating requires one or two for each hall. Some Committee Chairs having a multitude of functions to carry out may have several working or sub-committees.

Delegation of Authority

Authority must be delegated to Convention Committee Chairs and further on down to working or sub-committees in organizing and carrying on their respective duties. Motivation can be accomplished by having faith that all Committees and Volunteers will do their job well and much more effectively if left on their own.

2-2

Suggested Organization (Convention Committee)

- | - Chair - organization, chairs Board meetings, recruiting group chairs, milestones, final report

- | - Recording Secretary for Board meetings

- | - Program - recruiting committee chairs, program, caller/cuer/leader info, hall scheduling, callers/cuers/leaders contact, ops room, sound, special groups, trail in/out, outdoor event

- | - Registration - recruiting committee chairs, registration forms, ribbons, badges, database, hotel accommodation, camping/RV, campground buses, welcoming, newsletters to registered dancers, registration kits

- | - Publicity - recruiting committee chairs, advertising, club promotion, information booth, souvenir book, media, opening and closing ceremonies

- | - Education - recruiting committee chairs, convention dress, fashion show, sewing, discussion groups, religious service, heritage

- | - Finance - recruiting committee chairs, treasurer, budgets, ways & means, business

- | - Support Services - recruiting committee chairs, halls, hall tables, chairs, food, shops, parking, dance floor, decorating, Society luncheon

- | - CSRDS Provincial Directors - Society Liaison, coordinate Society functions:
 - | - Luncheon, Board Meetings, AGM, Seating, Opening & Closing Ceremonies, etc.)
(refer: Operations - 4.1 Programming & 10.4 Society Luncheon

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3-1

PLANNING

The object of planning is to see that all required actions and events are completed on time. The organizers must also determine the sequence of activities, the order in which things must happen. In the business world the standard planning tool used for a one time project with a fixed completion date is Critical Path Scheduling. This method effectively allows scheduling control of critical activities in a chronological order. This system has been used by past Canadian national conventions with success. Each committee must draw up a list of all the tasks to be completed. They then estimate the time for each and draw an arrow diagram of the sequence of tasks. These nets are then combined where they interact with other committees and an overall critical path determined. This system allows individual Committee Chairs to pay particular attention to critical tasks under their jurisdiction, leaving the not so critical or remainder of tasks to be handled by others. With such a system, each Committee Chair reports back to the Convention Committee its present status as to the Critical Path, where upon adjustments or corrections as needed are then applied. Refer section 3.2 "Typical Critical Path Schedule".

Communications

Communication links in any large undertaking are essential in order to pass information and maintain control. Convention Committee meetings should be held as often as deemed necessary. Convention Committee Chairs should submit a written report on the status and progress of their jurisdiction at all Convention Committee meetings. All Convention Committee Chairs should be fully informed and aware on all aspects of the Convention process. A question and answer at these meeting is essential.

Profits

For the first five Conventions the profits on registration fees, and, in some cases, funds raised by Ways and Means Committees, were apportioned 75% to the Society and 25% to the hosting organizations. Commencing with Convention '90 in Vancouver, the Society's policy was amended to apportion 15% of the gross registration fees to the Society with the balance of the profits to the host association and host federation.

In addition starting with 1990, the handling of a possible loss was changed to conform with the Society **Regulations 5.5** which states:

"The sharing of any deficit shall be negotiated by the Board of Directors and the hosting organization."

The mechanism used to handle any loss is spelled out in the Letter of Agreement for each Convention, which forms part of Volume 1 of these Guidelines.

Major Milestones (Typical Critical Path Schedule)
Year 1-4

Month and Year

Year 1

- Jan - Bid for Convention submitted to Society
- Aug - Area sanctioned by Society to Hold Convention
- Sept - Organization set-up in area

Year 2 (Preceding Convention year)

- Apr - Registration form for area use finalized
- Sept - Registrations opens for designated local area
- Sept - Designated local area publicity and promotion opens
- Jan - Registration Form for general use finalized
- Apr - Publicity opens for the rest of Canada and the world
- Aug - Publicity Release across Canada
- Aug - Start of sale of registrations outside area
- Nov - Publicity packages sent across Canada

Year 3

- Jan - Hall Selections finalized
- Apr - Registration Badges finalized
- Sept - Mailing of info to all registered
- Oct - Final usage allocations of all rooms and halls
- Nov - Publicity packages sent to Border States and overseas

Year 4 (Convention Year)

- Jan - First draft of Registration Information handout
- Feb - Second mailing of info to all registered
- Mar - Staff selections finalized
- Apr - Opening and Closing Ceremonies finalized
- May - Final request for signs
- Jun - Dance Program finalized
- Jun - Souvenir Book - last input
- Jun - Final mailing of info to all registered
- Jun - Registration Information Package finalized
- July - Assembly of Registration Packages
- July - Convention starts
- Oct - Final Report
- Dec - Close-out of Convention Books and Accounts

Dates are based on sanction being given four years before convention.

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4.1

PROGRAMMING

The overall planning of the program has to be done at the Convention Committee level due to the interrelation of various functions. Conflicts between scheduling meetings, panels, fashion shows and special entertainment must be detailed with the program. No function or dance should be scheduled during the opening or closing ceremonies.

The Convention area Society Director and the host Convention will make arrangements that sufficient time be scheduled at both the opening and closing ceremonies suitable to meet the needs of the Society Board, and that a designated area be set aside at the closing ceremonies for the placement of Callers and Cuers in order they be recognized and acknowledged.

The detailed programming of callers, cuers, and leaders involves having standbys for no-shows. Once a standby is called, the original allocation is canceled. Program organizers must be quite firm in this decision. Events must take place as scheduled and on time, and not be allowed to run overtime by the Master of Ceremonies, or other such delegated person.

Some conventions have produced, in advance, lists of round dances to be cued at the convention. It has become typical to print and sell the cue sheets for rounds and clogs taught at the convention; usually at a break-even price.

5.1

REGISTRATION

Registration Forms

Good design of a registration form will ease the entire task of the registration committee. The standard criteria of simple, easy to read, logical sequence and attractiveness should be born in mind. Copies of past registration forms are available; however the last two conventions would probably be the most applicable. The experience of the previous convention has been incorporated sequentially into each registration form. The initial production of the form should be only enough to cover the local registration area as national distribution should be discouraged until the immediately preceding convention is held. Corrections can be made before reprinting.

Although there may be valid local reasons for using a unique pre-registration form, careful consideration of the extra work and follow-up action needed should be made before instituting the pre-registration form. The ideal is to have only one form for the entire convention.

A receipt form acknowledging registration should be sent back to registrants. The usual practice is to print approximately 10 fold more registration forms than is required for a convention.

Liaison with the program committee is necessary in order to include caller, cuer, and leader information and steps taken to pass this information to this committee as soon as received. Other special characteristics may also be useful on the form, such as wheelchair dancers, panelist or fashion show models and dance level usually attended. The Convention refund and cancellation policy should also be shown on the registration form.

Computerization and electronic mail

It is essential to keep convention records of all types on computer database in order to provide information to organizers and dancers. Registration stats, as well as programming, scheduling and all aspects of Convention information on computer database are of immense benefit in planning and to bring about a successful Convention. Caller/Cuer or Dancers registrants can all be entered into and accessed from computer database. The use of electronic mail is a quick, economical and effective means of Communication, which should be used at every opportunity for registrant's exchanges. The information most typically requested by registrants includes: accommodations lists & prices, number of dancers registered & their geographic locations, callers/cuers/leaders registered, dancing levels, venue locations, type of floors, air conditioning, etc.

5.2

Registration Fees

The setting of a registration fee is important for a convention. Too low a fee will not permit expenses to be covered; too high a fee will tend to discourage dancers from attending. The fee of previous conventions will have considerable impact on setting a fee. The main problem for a committee will be that they will have only rough estimates available when setting a fee and care must be taken to ensure that costs can be met. The revenue and expenditures of previous conventions are a good guide of how much should be estimated in each area. The two basic methods of fee setting are sliding scale and flat rate. The sliding scale encourages earlier registration, but is more difficult to account and plan for. The flat fee permits easy accounting, but there is no advantage for early registration. The use of day registrations should be avoided if possible. The main difficulty is that some dancers will only register for the main attraction day and crowd out those who registered for the whole convention. There is also a problem with door sales and the handling of cash in a normally unprotected area. Registration at the door should be discouraged, but is practically unavoidable. It is very difficult to turn away someone at the door, who has driven a long distance or whose forms were lost in the mail.

Convention Badges

There are usually two badges associated with a convention: the National Convention maple leaf badge and dangle and the local convention badge with the name and hometown of the dancer. The maple leaf badge was designed by Edmonton for Convention 1978 and has been used without exception since. No changes to this badge should be made without the concurrence of the Society. Starting with Edmonton, it has been usual to sell a City name and province rectangular dangle to be attached by two rings to the badge itself or to a previous dangle. Both of the above badges are manufactured of laminated plastic. It is important to have the letters double cut to improve the quality and eliminate the line waviness. The style, shape and manufacturing method for the dancer's name and hometown convention badge is left to the discretion of the convention committee. Good design, badge size, safety hazards, cost, local identification symbols and availability of production facilities all should be considered in selecting a badge. Correction of name mistakes during registration should be provided for. The badge should be light enough in weight to be worn without difficulty on a light summer dress. The letter size of name and hometown should be large enough to be read across a square by those with "over 40" vision problems

6.1

Accommodations

Lists of Hotels, Motels, Hostels, Bed & Breakfast, and other area accommodations should be made available on the Convention website and provided with registration confirmation receipts, as well as in all mailings, advertisements or promotional publications. Accommodation lists should include: rates, distances to the Convention site, bus routes, parking, and other pertinent information. Blocking of rooms should be arranged with responsive Hotels and others as deemed necessary, usually 25% to 30% of expected Convention registrants. A group of blocked Hotel rooms in close proximity should be set aside for the Society Board in order to facilitate attending meetings and other Society functions. Reservations are to be booked direct by registrants to the Hotels or other facilities. The Convention organization involvement is in providing listings and blocking of rooms only with no involvement with any direct transactions.

7.1

FINANCE

Conventions require an in-depth accounting system if any semblance of financial control and public trust of the organizers is to be maintained. This is particularly true when any public funds and grants are accepted for financial assistance. Essential financial planning for a successful and solvent Convention, includes these requirements, decisions and procedures:

Sources of Convention funds: how much? how soon? - To borrow or not to borrow?

Government grants? - Sponsors? - Forward estimates and program budgets.

Establishing accounting procedures and systems. - Handling money and banking.

Who signs what, for what and for how much?

Engagement of auditor and following auditor's advice.

Plan in advance a margin of profit and sustain flexible approaches until such time as risk factors are fully controlled.

Compatibility and compliance with By-Laws of parent organizations.

Unlike other Committees where it may be advantageous to be imaginative, creative and full of ingenuity, a strong Finance Committee should be set up with persons experienced, qualified and comfortable in money and business methods. An acceptable working capital position for the commencement of activities is usually about four percent of total estimated convention expenses. Advance funds should be raised quickly to set events in motion initially.

The Finance Committee must be allowed to exercise control over activity expenditures and must keep the Convention Committee informed of the state of finances. The Finance Committee must have total responsibility for such matters as budgets, control of funds, cheque-cash controls, loan controls, purchasing controls, review of draft tenders and contact documents, accounting and records, security and insurance protection, banking, payment of accounts, inventory of assets, post-convention financial audits, Society, federation and Government audits where necessary. Policies for obtaining several quotations prior to procurement of supplies and services, and the establishment of levels of expenditures by the Convention Committee are needed. Low limits of expenditure without Convention Committee approval will create unnecessary work and a drift into a rubber stamping approval operation. Too high a limit may result in lack of control. As long as attention is paid to the approved budgets, Convention Committee chairs should be free to commit funds against their budget items.

Budgets must not be considered as limits of expenditure. Budgets are targets to aim for. Under budget costs do not constitute authority to spend the money elsewhere. Budgets are there not as an authority to spend up to that amount, nor do they represent a limit on expenditures. Budgets are a planning device.

All Convention Committee Chairs must be required to keep accurate records of their expenditures and revenues. Especially subject to audit control are major revenue-producing committees.

Failure to keep accurate and accountable records will delay final financial audit and termination of legal responsibility for months after the Convention is over and details almost forgotten.

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Convention Insurance

Hosting organizations sponsoring major Conventions, may wish to negotiate their own Insurance coverage, if they have not already done so, or they may prefer to obtain basic coverage through membership in the Canadian Square and Round Dance Society, or a combination of both.

“Third Party Legal Liability” is the recommended insurance, as it provides maximum coverage at minimum cost. Unlike the more familiar home or accident insurance, claims are settled only as a result of a law-suit or litigation.

Basic Recommended Coverage includes:

- a. Comprehensive General Liability, limit \$5,000,000.
- b. Tenant's Fire Legal Liability, limit \$5,000,000.
- c. Non-owned Automobile, on member organization's business including Convention Committee staff.
- d. Deductible Endorsement - \$250.00.
- e. Contingent Employers Liability

The Liability Insurance protects against claims arising out of bodily injury or damage to property of others as a result of an occurrence for which the insured is liable by law. The insurer defends the insured in any Civil Action brought because of such damages and pays the resulting costs.

Special Convention Coverage. As an extension of the basic recommended policy, or the coverage offered by the Society, additional protection may be negotiated to cover the special requirements of a major Convention. The cost of such premiums depends on the number of participants attending the Convention; the duration of protection may be limited to the actual dates of the Convention, or may include one or two days before and after the event.

Suggested Options for Convention

- a. Convention Liability (depending on size of attendance)
- b. Fidelity Bonding
- c. Interior-Exterior Hold-Up (theft)
- d. Theft-Fire-Loss-Damage on Borrowed or Rented Equipment and other items of value.

It is good business practice to require Service Contractors to carry their own insurance and to submit proof of this insurance.

General Sales Tax (GST)

Whether to collect, remit, and deduct GST (or Harmonized Sales Tax (HST)) have had different interpretations by Conventions since the GST was implemented. Halifax planners were very firm that it must be charged. Edmonton planners were equally firm that it must not be charged. The basic problem has been the interpretation of the regulations as it applies to Canadian Conventions. The key element is an expectation of profit and how it is viewed by Convention organizers..

The most definitive work done so far on the issue was done by Edmonton for Convention 1996. They decided to not collect, remit, and deduct GST. Ottawa 1998 planners followed the Edmonton lead because it was a unchallenged precedence, which shifts responsibility back to the Government to show that it is applicable. The Edmonton precedence was based on GST Memorandum 300-4-6 dated May 1991. The applicable parts were:

“Public service body” means a non-profit organization, a charity, a municipality, a school authority, a hospital authority, a public college or university;...

17. A supply made by a public service body of tangible personal property or service made in the course of a business is exempt from the GST if the consideration for the supply is equal to the usual charge by the public service body for such a supply of tangible personal property or service and does not exceed its direct cost.

18. A supply of any service (other than a supply included in section 6 of Part VI of Schedule V to the Act) made by a public service body in the course of special events or activities is exempt from GST if the total revenue from those supplies made during the course of the entire special event or activity could not reasonably be expected to exceed the total direct cost of providing the services.

Jim Wilcox, the Chair of Finance for Convention 96 Edmonton, stated, in part, in a letter to Lorne and Connie Bowerman of Convention 98 in Ottawa on September 25, 1996:

- 1. We are a “public service body” because of our non-profit organization status;*
- 2. Supply of property or service is planned at cost. A profit margin is not planned for;*
- 3. The Convention is a special event for which total revenue is not expected to exceed total cost. If there is an excess, it should relate to better than expected attendance or less than expected expenses;*
- 4. I don't think the overall scheme is compromised if conservative planning measures are employed such as break-even point at less than hoped for attendance or something like “provision for unexpected expenses”.*

Conventions are strongly encouraged to follow the Edmonton precedence and not charge, remit, or deduct GST. Conventions are advised to beware of getting one or two opinions. Convention 98 planners in Ottawa obtained much conflicting advice from Revenue Canada personnel, all advice given in good faith and to the best interpretation of the situation as explained by Convention planners.

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PUBLICITY

The publicity and public relations aspects of a convention are closely related, and should operate under one chair. Publicity is directed toward attracting dancers to the convention; public relations involves establishing contact with the non-dancing public, news media, elected officials at all levels, business community, etc. to ensure that the convention is well received and supported. This section will deal exclusively with publicity.

The first step in the publicity program must be an overall plan outlining the content and timing of release to the following:

- a. member clubs of the sponsoring hosting organization.
- b. all square and round dancers across Canada.
- c. dancers in the United States and Overseas.
- d. publicity and registration booths at other conventions and major dance events.
- e. direct mailing follow-up to registrants.

Timing of the publicity campaign is very important. Preparation, approval, printing and postal delivery time must be built into the plan so that material reaches dancers at the right moment.

The publicity campaign in the local area should begin as soon as the convention bid has been accepted. The purpose of the local publicity is not only to get early registrations, but also to generate interest and enthusiasm which will yield volunteers to serve on committees and work on projects for the convention. If the local association has a magazine or newsletter, it will probably serve as the best means of communication with the local dancers. Reserve one or more pages in each of several issues and build up the publicity over several months, starting with basic plans and adding details as your plans develop. In the absence of a magazine, publicity material will have to be distributed to the clubs. Publicity should be confined to the local area until the preceding convention begins.

The Canada wide publicity campaign should be a combination of direct mailing and advertisements in Canadian Square dance publications. Requests for club names for mailings can be made to local associations. Another good source is the dance club of registered dancers. Although postage costs are a constant problem, frequent mailing of small packages to different members of clubs (callers, contacts, presidents and secretaries will ensure that some of these get exposure to all dancers in the club - Don't forget 90% of the forms are wasted. There is no way to avoid this. Promotional material sent to the editors of dance magazines should be in the form of short "news releases" or "write-ups" which can be inserted, usually free of charge, and also formal print-ready advertisements in the correct size for the magazine. Most magazines levy a charge for advertising and this must be included in the publicity budget.

A Convention website complete with Registration Form and other vital information is a must, which can be linked to the Society website at: www.csrds.ca

8.2

The international publicity campaign requires careful planning. A series of advertisements should be planned to appear in the U.S. National magazines and in selected area magazines in states closest to the site of the convention. Ensure that the due date for advertisements is known and met. Addresses of U.S. contacts can be obtained from "The National Square Dance Directory, P. O. Box 880, Brandon, MS, 39208. This directory also gives information on overseas clubs. Publicity and display material for use at conventions and large dances should be planned and ready before the preceding convention. It is likely that the hosts of the preceding convention will include your publicity release in each registration package. Be sure to provide sufficient copies in the correct size. A registration booth and pageant have become the accepted way of starting off your publicity campaign. Mail-out display packages should be designed and sent out to the larger special events. More elaborate displays and registration booths should be planned for major conventions and events within traveling distance. Be sure to seek permission from the sponsors in advance. Be sure also to coordinate with other committees in your convention sponsoring group. There may be a charge for registration booths and some conventions have a policy of "no spot announcements" on the microphone.

Follow-up direct mailing to registrants should be designed to build up enthusiasm. Early releases should give general plans but later releases should be positive and give details of program and tourist attractions. The last release should be timed to arrive about two months before the convention. It should contain all information required by the dancer, such as maps or directions to the convention and accommodations, an outline of the program and special events, time and place to pick up registration packages, etc. Dancers should be reminded to bring their registration receipt as it speeds up registration. Anything else that the dancer will need at the convention (such as convention badges and souvenir 'programs) should be picked up at the registration desk, as this will save postage and prevent "forgotten" packages.

The convention logo should be designed and adopted in time for the first nation-wide release. It should be used on all correspondence and advertising material. The same typeface style should be used on all releases so that your material becomes easily recognized at first glance. Later on, the publicity committee may wish to adopt a second eye-catching cartoon or motif to bright up the written words. Provincial and city tour information can be used effectively to augment publicity releases. This material is usually available free or at nominal mailing costs.

Postage charges will consume a large portion of the publicity budget. It is suggested that a postal scale be obtained and material for mailing be weighed so that the maximum information can be sent out within the given postal rate increment. Paper stock should not be unnecessarily heavy and printing should be on both sides of the paper.

8.3

The publicity chair should work closely with the registration chair. A drop or lag in registrations as compared with the same time for previous conventions could well be a signal that publicity should be stepped up. Contingency funds should be included in the budget to meet such an eventually. It is equally important that the publicity chair maintain a close contact with the rest of the committee chairs so that the latest "newsy" highlights can be communicated rapidly to potential convention registrants.

Souvenir Program General

The Souvenir Program book is an established part of any convention. It should be included in Canadian conventions Souvenir Programs are not purchased by all dancers. A rough guide is about 40% of individual dancers. Thus for 2000 dancers about 800 copies will be sold. This can be more accurately determined by comparing registrations with orders for booklets as time goes on and a fairly accurate order placed with the printers during the final few months before the convention. It is important that a good quality program be produced to make it easier for subsequent conventions to sell publicity and programs and to ensure that it will be treasured among the souvenirs of dancers.

Planning

Advertising - Convention organizers should recognize that square dance souvenir programmer are almost "specialist" in nature, of appeal, perhaps, only to square dancers, and limited in circulation. Because of this, businesses might be reluctant to advertise in a magazine that is not for general public distribution. For example, the ad rates for the Convention 82 program were set primarily to attract advertising from the square dance community, recognizing this community's somewhat limited financial capabilities. The bulk of the advertising received for the Convention program came from within the square dance activity. Businesses in Halifax were approached, but response was poor, probably because of the above-stated reluctance.

Selection of a Printer - Discussions with a printer should begin as early as possible to determine printing costs, printers' capabilities etc. Select a printer who is well recognized in the community and one who is reliable. Obtain as much information from him as possible regarding costs, time required to set up and print etc. Colour work is very expensive and requires considerable thought when organizing the program so that printing costs are kept to a minimum. For example, each colour photograph will cost approximately \$300 for four colour separation and the cost of printing is over and above this amount.

Material - The gathering of material for the publication cannot begin too early. Also, early contact with various groups arranging program activities is essential so that inputs are timely. Allow at least two to three weeks for editing and proof reading all the material. Advertisers should be requested to submit digital, camera, or photo ready material.

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8.4

Information Desk

Dancers, particularly those from out-of-town, will expect the Information Desk to be a central source of all types of information pertaining to both convention matters and city information. It must therefore be well organized, easily located and manned during all times that the dancers are in the building. This will require a large staff of volunteers on a rotating shift basis. Information must be pre-planned and available in an indexed written form as verbal hand over from shift-to-shift is not reliable.

Considerable advance work by a few persons is required. As well, the booth organizations group should have clear lines of authority and responsibility.

The location of the Information Desk is very important. It should be centrally located, well marked, and if at all possible, in direct line of sight with other specialized desks and booths so that specified questions can be directed to the appropriate area. Information volunteers should be briefed to re-direct these enquiries by saying "Right over there at the Registration Booth, Teen Desk, etc." It is also important that the times of operation of various desks be coordinated with the Information Desk, and if other desks are left unattended, signs should be posted "Back At _____".

Large free standing or wall mounted charts can be used effectively to reduce the workload at the Information Desk. Information displays should include:

- Daily program in large size - be sure to change it each day.

- Floor layout diagram showing location of all halls. Use a "you are here" arrow marker to help the dancers orient themselves.

- A blow-up map of the city area with major points of interest, hotels, motels restaurants and transportation routes marked or flagged.

- A dancers message board where guests can leave messages for their friends.

- A lost and found board where small articles can be pinned up or messages left as to where valuable found items may be picked up.

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The Information volunteers will require at least two copies of an information manual, preferably in a loose leaf ring binder, well indexed for ready reference to anticipated questions. Ideally, all Information volunteers should be familiar with the local area but convention experience indicates that even local city residents are not necessarily knowledgeable of the immediate area around the convention site. Many of the questions will undoubtedly be about the location and hours of operation of such local services as drug stores, liquor stores, food outlets, transportation services, banks and tourist attractions. The most asked question is always - Where are the washrooms?

The decision as to what services require separate desks/booths and what can be handled by the central information desk will depend upon the local situation and space available. Registration requires a separate desk and should not be tasked with information duties except as directly pertaining to registration. Separate booths should be set up to handle items for sale. Information volunteers should not be tasked with handling cash. Depending upon the local situation it may be necessary to have separate booths for such items as souvenirs, transportation passes, teen activities, singles activities, spectator passes and souvenir programs. Alternatively one central booth could be set up to sell these items. If this alternative is chosen, it is suggested that a notice board be displayed, listing the various passes, tickets, etc. and their prices.

A table for displaying "freebie" and "take one" tourist folders, extra copies of programs, agenda, etc. will relieve the Information Desk of many simple enquiries. Extra copies of material contained in the dancers envelopes are frequently requested because the dancers have forgotten their Copies in their rooms or at their campsites.

EDUCATION

The Education Committee is responsible for panels, discussions, fashion show, heritage, and any function which increases the dancer or caller/cuers/leaders knowledge.

The major problem of this group is communications in order to contact potential members of panels and fashion shows. Advertising takes much effort as panelists and fashion show participants usually only volunteer as a result of personal contact. Registration forms could contain a space to indicate willingness to participate. Failing this an additional questionnaire could be sent out with a subsequent mailing. Panels frequently conflict with other events and for this reason are usually held in the mornings only.

Sewing clinics have offered patterns to be copied on newsprint.

Fashion shows take a lot of organization but are very popular. Winnipeg had 500 seats and had to repeat the show. Tickets were made available and in addition the participants paraded around the convention center for those who could not get tickets. This suggests that a larger hall or theatre is needed with at least 1000 seats.

Heritage Gallery

The Heritage Gallery is considered well worthwhile and attracts considerable interest.

Photographs of past dance events are particularly popular, provided that they are clear and large enough to easily identify faces. Some care should be taken to stick to the theme of "Heritage" as there is a tendency to shift to a tourist type of display, which advertises the area rather than the dance history of the area.

It is important to choose a central theme early. For a history theme, a booth type display of items of historic interest, primarily from a local area or province could be done. The theme could also be expanded to include displays "from coast-to-coast"- Items considered suitable for display include banners from major events, badges from defunct clubs, pictures, newspaper clippings, old dance flyers and odds and ends of various kinds. Dressed dolls add a three-dimensional quality and colour to the displays. Old square dance costumes can also be used to advantage, particularly if store mannequins are available on loan.

Other themes or methods are possible. For example, tapes, DVD, etc. of dances from previous years could be included. Also, there is a wealth of taped and digitally recordings available but the workload of collecting, editing and re-recording from various media may prove to be more than the committee wishes to tackle. Any move into this area could also involve the logistics of providing sound equipment and require isolation of sound from adjacent booths.

In summary, a heritage gallery is considered an interesting and valuable addition to a convention. Early selection of a theme is necessary. An imaginative display adds to the attractiveness of the gallery.

SUPPORT SERVICES

This group looks after all the support services not covered conveniently by any other committee. The rental of halls, allocation of space, general transportation, food, security, decorations, clean up, parking, shops, first aid, etc. The workload of this group seems to grow during the convention. Committees must be added as needed and workloads delegated early. Fortunately, some of these functions are unrelated and can easily be split off.

Food

The availability of eating facilities close to the Convention site adds considerably to the enjoyment of dancers. Usually two types of facilities are needed: the fast refreshment and snack foods outlet and the complete sit down meal restaurant. Both types cater to a different requirement. If insufficient fast food or sit down facilities are available, then provision must be made to cater to one or both of these demands.

Below are some points to be considered in dealing with food concessionaires and caterers.

Food Discussion Points

Sit Down Meals

1. Definitions of service, quality and menus for:
 - a. breakfast
 - b. noon
 - c. supper
2. Establishment of time for service.
3. Establishment of standards and kinds of service for items such as
 - a. Cups - paper, plastic, crockery?
 - b. Plates and saucers -paper, plastic, crockery?
 - c. Flatware - plastic or metal?
 - d. Serviettes - paper and size?
 - e. Cafeteria or table service?
 - f. Rate of service - number of people to be fed during periods?
 - g. Tipping- allowed or disallowed?
 - h. Place mats?
4. Sanitation Standards required.
5. Kitchen equipment needed beyond those in existing building.
6. Clean-up
 - a. during meal service
 - b. after meal service
7. Payments of:
 - a. meals served to dancers
 - b. surcharges from caterer to convention committee and when?
 - c. unforeseen expenses
8. Required liability and other insurance coverage of caterer and provision of proof of insurance before signature of contract.
9. Other details such as:
 - a. Is security staff required?
 - b. Are signs needed?
 - c. Are decorations needed?

10.2

Fast Food Refreshment

1. Definition of such services
2. Menus
3. Hours of Service
4. Sanitation Standards
5. Contractor's responsibility
6. Responsibility - to building owners
- to convention committee
7. Negotiated prices
8. Surcharges if any

Convention Items

Starting from nothing in 1978, the number of items associated with Canadian conventions has grown steadily through the years. When a Convention does something they consider worthwhile, it is usually sent on to the next Convention. Although not significant in the beginning, the increasing number of items has become a concern for administration and shipping.

The basic problem is to decide what is or is not significant to Canadian Convention traditions. Because each Convention views their own things more favorably than things from previous Conventions, a formal method of keeping track of existing items and adding new items is needed. The ideal vehicle is the Convention Guidelines, Volume 2, which puts the responsibility on the current Convention Chairs and the Society's Board of Directors.

The official convention items are:

- X Canadian Flag;
- X Freddie;
- X Canadian National Banner;
- X Convention City Pennants; and,
- X Convention Chair's Chain of Office.

The details of the official items are available from the Convention Coordinator.

It is important to keep all items and their packaging in prospective. The items themselves are important, while the shipping bags, boxes, poles, and other display devices are less important. For example, Freddie could be removed from the cardboard box and placed in the trunk of car. A suitable cardboard box could be found when he arrives at his new "temporary home".

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Responsibility

This paragraph deals with valuable Convention Items and not with boxes, poles, bags, or optional items. It is the responsibility of the host Convention to package and handover to the next Convention, at a mutually agreed time, the Convention Items listed above. The next Convention is responsible for the shipping and safe storage of the Items in their own area. The next Convention is also responsible for checking the Convention Items for their condition. Any item or items missing or damaged should be reported to the Convention Coordinator, who shall investigate the missing or damaged items and recommend to the Society's Board on whether the item or items should be replaced, repaired, or removed from the list of Convention Items. The Society's Board shall make the final decision.

Adding Items

With the agreement of sanctioned future Conventions, the current Convention Chair shall recommend adding or deleting items to the Convention Coordinator who will forward it to the Society's Board for approval or rejection

Society Luncheon

A tradition of many of the early Canadian Conventions was to hold a Society Luncheon to recognize the work of Convention organizers, past Society Presidents, and the current Society Board. It has been a quiet and pleasant time in the midst of a busy Convention schedule.

The Society Luncheon has taken place at noon on Friday, after the Annual Meeting of the Society. The Convention area Society Director and the host Convention will organize and approve the Society Luncheon menu, time, and place. Luncheon costs to be paid by the Society, although other funding arrangements can be made, including attendees paying for their own meals.

Attendees

The attendees are the present Society Board, the Past Presidents of the Society, the Past Chairs of Conventions, the Chair of the host Convention, and the future Chairs of scheduled Convention.

In order to encourage continued attendance at Conventions and to reduce the amount of administration needed, convention registration is required to attend the Society Luncheon.

A list of the Past Presidents and Past Chairs is kept by the Convention Coordinator. The list will be made available to each convention when required.

Correspondence

Invitations should be extended by the Society President and distributed through the Convention newsletter mailings. The host Convention should provide all the necessary details for the attendees.

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FINAL REPORT

A final convention report is an essential part of any convention. The report should be written and aimed at those organizing future conventions so what was done, how much did it cost and results obtained should constitute much of the report. The report should be as objective as possible. Numbers of workers and organizational structure should be included. The report should not be used as a vehicle for praise of a convention's accomplishments nor long thank you's to the committee. Again, it is important to aim the report and its recommendations at someone organizing a future convention. The final report should be divided into an overall covering part of about six pages followed by group reports. The overall covering part should include background, organization, overall results and recommendations and acknowledgment. The group reports should contain sections on purpose, organization and a committee report for each committee. About 15 copies are recommended as follows: Area Association - 3, National Society Convention Coordinator -3, Provincial Federation -3, Auditor - 1, Organizing Committee -3, Future Conventions- 2 .

The due date of the final report is 90 days after the Convention. The format below should be used for the final report.

General

Under the general section, the background of the Convention should be given and the general details of where, when, size, by whom and general data.

Organization

An outline of the organization should be made down to committee level. The number and frequency of meetings should be covered. An organizational chart should be included.

Overall Results and Recommendations

These should be very generalized major points only and cover good and bad aspects and what we would have done differently.

Acknowledgment

In this section thanks should be given to those that worked on behalf of all of the committees.

The format below should be used for the committee report part of the final report.

Group Reports

Each group report should start on a new page and cover the work of all the group's committees. The maximum length of the group report should be about ten pages. Information contained in the general section should not be repeated. The Finance Group report should contain a two page financial report using the revenue/expenditures method of reporting.

Each committee within a group should describe its task, what was done, the method used, costs, and any statistics that would describe the job. The number of persons involved over what period should be covered. Specific recommendations should be made aimed at a future convention organizer. "Thank you's" should be avoided.