

CALIFORNIA BLACKSMITH ASSOCIATION

CONFERENCE GUIDELINES

(with proposed updates by Paul B. in red...)

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(Page numbers need to be updated.)

CBA CONFERENCE GUIDELINES

Every California Blacksmiths Association Conference is, above all else, an educational event. Members come to learn about blacksmithing. The CBA is chartered by the State of California and registered with the IRS, as a non-profit educational organization. As the single largest educational event that CBA sponsors, our Spring Conference should provide a valuable learning environment for professional and amateur blacksmiths. Demonstrations, seminars, and workshops must be tailored for all levels of interest: novice, intermediates, and advanced. You should keep in mind that suppliers, like dealers of welding and grinding equipment, could provide valuable information. Dealer representatives can be just as educational as someone teaching a workshop or putting on a demonstration.

The CBA Spring Conference is our largest event of the year. It is also, usually, the largest blacksmith gathering on the West Coast, drawing participants from many diverse areas.

Year to year consistency needs to be maintained through a Board position of conference coordinator. If the "conference coordinator" position is vacant, the CBA Vice-President will act as conference coordinator.

CONFERENCE CHAIR

The conference chair is a volunteer position although the CBA will generally reimburse all budgeted, reasonable and documented expenses incurred in the creation of the conference.

The Conference Chair is responsible for:

1. Selecting the committee to plan and organize the conference
2. Setting the dates of the conference
3. Selecting an appropriate site
4. Determine the conference fee
5. Determine what meals will be provided and how
6. Contracting with the site, food services, and any other services that may be required
7. Keeping the board informed on the progress as the conference comes together
8. Handling promotion in the CBA publication, **CBA web site and other media.**
9. Is the clearinghouse for information
10. Overall management and co-ordination of the event
11. Sales Area - As a service to the members a sales area shall be provided. This should include space for commercial sales, tailgate selling, and a secure area for books, if possible.

DEMONSTRATORS

The demonstrators are the heart of the conference. Determine how many demo slots need to be filled. Usually there are morning and afternoon slots for each demo site. At least one site should be used for a beginner workshop(s). An intermediate level workshop is also desired. The main demonstrator is usually for the advanced level and may be brought in from outside. All workshop leaders need to be qualified CBA instructors.

Demonstrators will need to:

1. Sign a written contract specifying the times of their demonstrations, the subjects they are covering, and the fee or other reimbursement they are to receive.
2. Supply lesson plans and handouts describing their demo.
3. Provide a list of tools and supplies they will need.
4. Provide their social security number. Demonstrators should understand that, under the law, CBA is required to send out IRS Form 1099 to everyone who receives a fee greater than \$600.00. A line for this can be placed on the contract.
5. Be a CBA member. To be covered by our insurance, the Board of Directors has voted a free membership for all demonstrators, but **they must fill out a membership form.**

Conference Chair will need to:

1. Generate a schedule of the demonstrators to be included in the registration packet and for publication in the Magazine and on the CBA web site.
2. Get copies made of any demonstrators' handouts before the conference begins.

GALLERY

A gallery chairman is appointed by the Conference Chair. The gallery chairman needs to:

- Have a system for registering items in the show, noting if they are for sale and, if so, the price. **The registration form should have a cell phone number for contacting the owner.**
- Give receipts for each item consigned to the show.
- Check out the facilities ahead of time to see what might be required.
- **Have and communicate a plan for what to do with items not picked up at the end of the event.**

If possible, a good photograph should be taken of each piece in the gallery as record for the CBA library or for use in the Magazine.

LOGISTICS (Things to consider)

You may want a chairperson for each sub-heading:

1. Conference Site

- A. Demo sites - shelter from wind and sun
- B. Washroom facilities
- C. Set-up and clean-up of site
- D. Road markers - orange anvils
- E. Pay telephones
- F. Coffee station
- G. Security
- H. Trash cans
- I. Forge attendants
- J. Limits of conference area
- K. PA system - for each demo site
- L. Food - meals, drinks, coffee & fruit, paper goods
- M. Tailgate sales
- N. Camping/RV area
- O. Banquet facilities, if needed
- P. First aid - medic, hospital location, supplies, Courtesy (Safety) Committee

2. Off Site

- A. Lodging - motels, camping (RVs and tents)
- B. Banquet facilities, if needed
- C. Procurement - fuel, material, equipment
- D. Transportation

3. Finance: With guidance from the CBA Treasurer)

- A. Budget
- B. Conference fee

- C. Insurance – liability
- D. Cash on hand for change
- E. Judicial disbursement (what is this??)
- F. Scholarships and 'Comps'
- G. Final Report and necessary 1099 forms

4. Promotion

- A. Public relations - news media, ABANA magazine, CBA newsletter, Internet promotion.
- B. Trade show – manufacturers’ displays
- C. Registration - attendees, name tags, give-away material
- D. Iron in the Hat - tickets, contributions, drawing
- E. Auction - contribution, sales
- F. Program

5. Conference Program – Includes:

- A. Vendor paid ads
- B. Demonstrator biographies
- C. Demonstrator notes
- D. Graph paper for notes (about 4 pages)
- E. Safety policy
- F. Harassment policy

6. Gallery

- A. Site - storage, lighting, set-up
- B. Registration - assemble material, receipts
- C. Library
- D. Jury, if required, and non-juried show
- E. Documentation – photographer, lights, background
- F. Security

7. Demonstrators (Coordinate with education chair)

- A. Selection
- B. Programming-summary of demonstrations
- C. Reimbursement-1099 forms
- D. Team demonstrations
- E. Station numbers and signage
- F. Station attendant, chalkboard
- G. Contract – Social Security Number for 1099 and membership forms
- H. Need to have one or more assistants

8. Educational Program (Coordinate with education chair)

- A. Films, slides (from members, rentals from library, demonstrators' work)
- B. Lectures
- C. Brochures, handouts, etc.
- D. Workshop learning sessions offered in mornings and afternoons
- E. Students are to supply their own tools
- F. Instructors need to develop lessons and recruit helpers

FACILITIES

Site

Things to consider are:

- * Shelter in case of bad weather
- * Lodging close by, also camping on site
- * Access to freeways, airports, bus, etc.
- * Bathroom facilities - with showers for campers
- * Food preparation facilities
- * Power – 110, 220, and 3-phase
- * Gallery facilities that can be locked
- * Secure area for conference, or will it have to be patrolled at night
- * Lighting at night for midnight madness
- * Lecture and slide/film area

Vendors

- * Vendor area (as well as tailgate sales -- you will need a covered and lockable place for books, etc.)
- * Assure that at least one welding supply vendor is invited. Although not traditional, welding and cutting technology plays a significant role in improving the productivity of the blacksmith.
- * Contact local welding suppliers, steel suppliers, and tool dealers

Motels

- * You will need several motel rooms for the demonstrators and complimentary rooms, as needed.
- * You will need to list several motels (with their names, addresses, and phone numbers) for attendees to choose from that are convenient to the site.
- * Contact local motels in person.
- * Negotiate for the best deal.
- * Block out the rooms (find out how long the motels will hold the room).
- * Contact the CBA Treasurer to issue a check to hold the block of rooms.

Food

- * A meal package for the whole conference should be provided, which includes the Saturday night banquet.
- * Get three bids from catering services. Food trucks have been used successfully but be sure to communicate carefully the number of people to be fed. Get a written commitment to show up at appropriate times.
- * Provide for people with special dietary needs such as vegetarian and gluten free.
- * The coffee station should have coffee, tea, hot chocolate, etc., available at all times. Provide the usual condiments of sugar, artificial sweetener, *real cream*, and artificial cream.
- * Soft drinks and water should also be in this area. Make sure participants can stay hydrated.
- * THE CBA DOES NOT ALLOW THE SALE OF ALCOHOLIC BEVERAGES. (We seem to have overturned this one.)
The CBA should not sell any alcoholic beverage. But we have arranged for concessionaires to do so under tightly defined limits. Since the success of the beer garden at the ABANA 2006 Seattle conference there has been an expectation that such an amenity be provided at our major events. This can be done but it takes careful coordination with the site and concessionaires who supply the beverages. Additional security may need to be arranged as well as means to limit access to minors. As sobriety is required when forging and operating power tools there is a difficult compromise to be struck. Also when dealing with concessionaires please convey that CBA members tend to be beer snobs. Just any brew will NOT do.

NOTE: The CBA Board of Directors voted in 2000 that all Spring Conferences should have a 'no-food' option. This is to reduce the cost of the conference for low-income members. You will need to offer a 'no-food' conference price. You will also need to track those who have paid for food to insure that those who have not paid are not in the food line.

REGISTRATION

General Guidelines

All registration responsibilities are to be handled by the conference committee with assistance from the CBA secretary; therefore you **MUST** be in communication with that person.

Some things to keep in mind, however:

- * Having participants pre-register is very advantageous for planning meals and other logistics.
- * Offering a discount for pre-registering is usually effective. The cut off date for this discount is usually set about three weeks before the conference date. A computer spreadsheet program is helpful for keeping things straight and easily determining things like one-day attendees, people signing up for workshops, and people attending the banquet.
- * Conference programs shall be available at the registration area of the conference at the beginning of the conference.

Registration information needs to include:

- * Name, address, phone numbers (home, work, cell), and email
- * Current or new member
- * Family or significant others attending
- * Paid for banquet (food)
- * Fees paid for workshops
- * Other relevant information ... such as paid meals, etc.

Credit Card Payments

The Treasurer, or qualified representative, will handle credit card responsibilities at the time of registration and throughout the conference.

Refunds

A refund policy needs to be stated on the registration form. Generally, a full refund is given if the member cancels three or more weeks before the conference begins, 2/3 refund more than 2 weeks before, and 1/3 refund more than a week before. In the last week before the conference, no refunds should be made except in cases of extreme hardship, a death in the family, major illness, etc.

PROMOTION

Promotion includes press releases to the media, posters and brochures, solicitation of donations from manufacturers and suppliers, and assembling a trade show. The posters and brochures are used to increase attendance from the local area and should be distributed to welding suppliers, schools, horseshoeing suppliers, steel suppliers, etc. Local suppliers may be interested in having a display at the conference and/or demonstrating their products. State and national suppliers should also be approached. Donation of items for Iron-in-the-Hat or the Auction should also be considered. (See "Time Line" for publication deadlines.)

You should make sure that articles about the conference appear in the three *California Blacksmith* Magazines published before your conference dates. Information on the conference should be posted on the CBA web site over the same 6-month period. It's also a good idea to post conference schedules and other last-minute information on the web site.

Reporter

A person or persons to write articles about the conference for the publication will be needed. A photographer to supply pictures is also beneficial.

Public Tours and Schools

Make available free, or paid, tours open to the public. These tours need to be a part of the publicity and included in press releases and other communications visible to the public.

School outreach should be a part of every conference. Make public tours highly visible to the community and reach out to local schools to offer learning programs. School programs can be limited to one afternoon.

EQUIPMENT

Equipment and supplies needed for the conference should be located as near to the site as possible. The demonstrators will supply a list of required tools and supplies for their area. Some things to consider are power availability; water locations, seating for demo areas (bleachers), slide projector, and white boards, PA system, and a tool area.

The tool area is where supplies such as steel and coal are kept until needed. A general "workshop" should also be set up to include:

- * Drill and bits
- * Welder
- * Grinder
- * Measuring tools
- * Band, saw and/or abrasive cutoff saw
- * Wrenches, screwdrivers, nails, drywall screws, etc.
- * Cutting torch

CONTESTS AND EVENTS

Contests

Contests add a fun and entertaining element to the afternoons but can be a hassle to get going. To get good participation, vigorous promotion is needed at the conference with considerable coercion to sign up. The effort is usually worth it, as everyone has a good time. Contests are usually easier to organize with teams. Offer a prize for winners.

Past Contests:

Cube Contest - upset a piece of 1 1/2" x 1-1/2"x3" into as nearly a perfect 2" cube as possible in one hour.

Sculpture Contest - given a packet of steel; assemble some kind of sculpture in one to 3 hours.

Anvil Toss - who can throw, roll, or whatever, an anvil the farthest.

Open Form - given one hour, which team can produce an item or items, which will sell for the highest bid.

Iron in the Hat

Collect contributions from members and suppliers, handle raffle ticket sales during the conference, and oversee the drawing. Some traditional customs are multiple ticket discounts such as 6 for \$5.00, the first choice going to one of the contributors, and the "by". The "by" consists of passing on the second ticket held by an individual that is drawn, so that a prize is selected on every other ticket held that is drawn.

Do not forget to purchase enough rolls of tickets. You will need 3,000 to 4,000 in ~~in three different colors~~. You will need to line up people to sell tickets. You should have people at every food line, in the hall just before the drawing, and around the conference in general. This income is very important to CBA's education program.

Auction

Solicit contributions from members well ahead of time. **The demonstrators often bring an item to be sold at auction. In addition many demonstrations and contests result in auction items.** You need pieces of more substantial value than is customary for Iron in the Hat. Select an auctioneer to oversee the auction. **The auctioneer may choose to group or reject items so that the process doesn't bog down. Also the conference chair or CBA officers may establish minimum bid amounts on particularly valuable items.** The auction is usually held after the banquet. Keep in mind that most of the money a conference brings in above expenses is from Iron-in-the-Hat and the Auction.

Advertise that the auction is open to the public.

Membership Meeting

The by-laws of the CBA call for one meeting of the full membership. This meeting is always held at the Spring Conference. You will need to schedule this meeting at a convenient time, either Saturday afternoon after lunch or Saturday evening after the banquet. The business of the meeting is mostly the handing out of workshop certificates, but sometimes there is an issue the membership must vote on. You will need to coordinate with the current CBA president. As well as a business meeting, this is a time to honor out-going board members and introduce new members.

Time is always a problem on Saturday night because of the banquet dinner, Iron in the Hat, Auction, and any other program that you may have planned. Your best bet is to make sure dinner is not late and to keep things moving. You can also move any slideshow or talk to some other time during the conference.

TIMELINE

NOTE: You will need to finalize your budget in time for a vote at the Board meeting before you need your advance for the conference.

8 - 12 months before: (to be approved by Board of Directors)

- * Select site and conference chairman
- * Prepare Budget and submit preliminary version to Board of Directors 12 months in advance of conference
- * Meet with Treasurer to coordinate financial matters

6 - 8 months before:

- * Select and send contracts to demonstrators
- * Put together promotion materials - poster, brochure, news release
(Print publications such as the quarterly ABANA Anvils Ring often require more than 8 months advance notice to provide effective coverage.)
- * Contract with site
- * Submit final draft budget to board

5 - 6 months before:

- * Put together registration package
- * Write promotional articles for the CBA Magazine and web site
- * Put together schedule for demonstrations
- * Distribute posters and brochures
- * Mail news releases
- * Contact suppliers about trade show and donations
- * Contact motels and arrange for rooms
- * Present final budget to Board of Directors

4 – 5 months before:

- * Get the three bids for cook, caterers, etc.
- * Update articles for publication
- * Locate equipment and tools

3 - 4 months before:

- * Solicit helpers for set up and clean up (incentives)

2 - 3 months before:

- * Contract with caterer or banquet facilities
- * Send out registration materials through publication
- * Check that demonstrators have returned have returned their contract with social security number

1 - 2 months before:

- * Send out more news releases
- * Contact tradeshow participants for any special needs they may have
- * Final promotion in CBA publication

1 month - 1 week before:

- * Check with all chairpersons to be sure everything is covered
- * Line up volunteers as to what they will be doing and when; make volunteer schedules.
- * Check on food suppliers – **be sure expectations are clear on the number of people to be fed.**

Day before:

- * Set up sites for demonstrations
- * Set up gallery
- * Bring in drinks, coffee supplies, etc.
- * Set up kitchen (if used)
- * Set up registration area
- * Post schedule for workers

Within 30 days after the event

- Submit invoices for Conference expenses to the treasurer (preferably sooner).
- A complete P&L and a variance analysis of the conference be prepared by the treasurer and provided to the Board of Directors

Within 45 days after the event

- Formal review of the conference P&L's, etc. will take place by the Board of Directors and the conference committee

FINANCES

The Spring Conference is the largest fundraiser for the CBA and without a certain income above expenses; the CBA ceases to be financially viable. As you prepare a budget for your conference you will need to check with the CBA treasurer to see what kind of revenue is expected of your conference. Aim for a 14% revenue after expenses.

The attendance at the conference will need to be estimated to determine the budget and conference fee. The CBA has by custom held the Spring Conference at venues in the northern, central and southern areas of the state. Attendance at northern and southern sites has been in the range of 200 – 250, while centrally located conferences often draw 300 – 400 paid registrants.

Unless there are special circumstances the basic (no food plan) registration should be kept under \$200.

The figures below should be adjusted to fit the particular costs of individual conferences as different sites and travel costs of different demonstrators will greatly affect the totals. Base the budget on people attending. For food costs, however, the number should be up by 20%.

A budget must be presented to the Board and approved by the Board before you can receive an advance to start your conference. The use of the budget spreadsheet (Excel format) will be used.

TYPICAL SPRING CONFERENCE BUDGET

SITE -----\$3,500 TO \$4,500
(Affected by facilities used and services provided)

FOOD -----\$20,000 to \$35,000
(By far the largest cost and the most variable)

SUPPLIES -----\$2,000 to \$3,000 (Most supplies can be
acquired through donations)

LODGING ----- \$3,000

(Lodging is usually provided for demonstrators and out-of-area conference committee members)

DEMONSTRATORS (total cost) ----- \$10,000

Guideline for demonstrators:

- \$500 per two-demo time slot (CBA member demonstrators)
- \$2,000 for the main demonstrator's fee
- Travel expenses will be paid for all demonstrators
- CBA Membership will be given to out-of-state demonstrators

COMPS

Complementary attendance should be at the discretion of the Conference Chair and should not be given without demonstrated dedication to the success of the conference. A comped volunteer will often be working during the conference so that there is little time left to attend conference activities. It is customary for conference staff to be given unique t-shirts and many volunteers may only get a tee shirt.

SAFETY

This is a major concern. At a CBA event all the standard CBA safety rules and guidelines apply. These guidelines are available from the CBA Education/Safety Committee and are posted on the CBA web site. Safety glasses are required and hearing protection is a good idea for all demos. Safety glasses and earplugs should be available for sale at the registration table. A good policy is to post signs at each site reminding spectators to wear their glasses.

The Safety Policy should be posted at the registration table and should be listed in the conference program.

You should also have a Courtesy Committee with enough members to cover your site. They should wear hats or vests that are easy to see. Their job is to be aware of safety problems and to help keep the conference running smoothly.

UPDATE THIS GUIDE

Your last duty as a conference chair is to make the next chair's job a little easier. After your conference is over, please review this guide and make any corrections

and/or additions. Then bring them to the next CBA Board meeting. Conferences are one of the most important things CBA does and your input can make the next one better and easier.

Reminder: Please write or have someone write an article about the conference for the next magazine. Include a lot of pictures. This is a good task for your reporter.

APPENDIX

1. Sample Conference Registration Form
2. Sample Schedule for Conference
3. Suggested Tool List and Location
4. Sample Budget
5. Sample Spread Sheet