

TFA ANNUAL REUNION PLANNING GUIDELINES

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HOW TO GET STARTED:

1. Any Towne Family Association member may submit a reunion proposal to the Vice President (VP) for a future TFA reunion. The proposal should include a rationale for the reunion location, the relevance to the Towne family, travel logistics, ideas for speakers and excursions, and any other information of interest.
2. The VP shall present the reunion proposal to the Board for approval.

RESPONSIBILITIES OF THE BOARD, THE REUNION CHAIR AND THE OFFICERS:

1. The Board shall:
 - A. Approve or deny reunion proposal.
 - B. Appoint the Reunion Chair.
 - C. Determine the year in which the reunion will be held.
 - D. Approve the reunion budget as prepared by the reunion chair.
2. Reunion Chair shall:
 - A. Be responsible for all contact with the hotel and speaker(s), and plan excursions including all logistics.
 - B. Prepare a reunion budget to be approved by the Board.
 - C. Prepare the reunion itinerary, working with the president to determine the dates and times for the Board and Annual Meetings.
 - D. Update the VP on a routine basis with all ongoing progress and concerns.
 - E. Prepare articles for *About Towne* during the year before the reunion. (This is a great place to ask for volunteers and solicit items for fundraisers.)
 - F. Appoint a co-chair and other committee members to be assigned duties as needed.
 - G. Recruit one or two people as official reunion photographers.
 - H. Prepare a final expense report for the treasurer. Include all receipts to be reimbursed within one month after the reunion.
 - I. Prepare a final article for *About Towne* for the issue following the reunion providing a summary of the event.
3. President shall:
 - A. Review and sign all contracts.
 - B. Prepare Executive Board and Annual Meeting agendas.
 - C. Work with the reunion chair to determine dates and times of Board and Annual meetings.
 - D. Prepare an annual meeting booklet as specified in President's Procedural Guidelines.
 - E. Purchase/prepare president's certificates to be awarded at annual meeting.

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4. Vice President shall:
 - A. Present the reunion proposal to the Board for approval.
 - B. Oversee the reunion chair and act as the liaison between the Board and the reunion chair.
 - C. Receive registration forms, deposit all receipts in TFA Bank of America account and send record of deposits to the treasurer. Create a detailed spreadsheet for the Reunion Chair. Include a list of name of attendee(s), address(es), email(s), phone number(s); meal and excursion choices; a line to mark descendant(s) of Rebecca, Edmund, Jacob, Mary, Joseph, Sarah; and any other pertinent information specific to the reunion.
 - D. Coordinate all sales, raffles and/or auctions (fundraisers) including donated and purchased items, raffle tickets and any other associated costs.
 - E. Have the discretion to purchase additional fundraiser items and attendee favors/small gifts. (Refer to the Two-Year Budget under VP for the budgeted amount. This amount is NOT part of the Reunion Budget prepared by the reunion chair.)
 - F. Oversee description cards for donated items and send thank you letters to anyone who donates items for the fund raiser. Please note that TFA is a 501(c) 7 organization and donations are not tax deductible.

5. Treasurer shall:
 - A. Work with the reunion chair to prepare the registration form which should be included in *About Towne* newsletters prior to the reunion as soon as it has been finalized. Registration form should include a final cut-off date of four weeks prior to the reunion after which no requests for refunds will be accepted.
 - B. Pay all expenses for the reunion, and work with the reunion chair to prepare a detailed financial report in the monthly financial statements following the reunion.

LOCATION GUIDELINES:

1. It must be accessible to a major airport.
2. The venue / hotel must be large enough to accommodate our members and include at least one meeting area, unless an acceptable alternative meeting space is available nearby.
3. The total cost must be affordable to most members including food, lodging and transportation.
4. It must have some ties to the Towne family and/or be of interest to our membership due to historical/cultural significance or genealogical research availability.

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BUDGET:

The reunion chair shall present a reunion budget for approval by the Board. The Board has the discretion to revise this budget based on current conditions and/or on the prior year's reunion's actual revenue and expenses. Any revisions will be approved by the Board.

Registration Form must include:

1. **Registration Fee:**
 - A. Registration fee is \$40 per person.
 - B. Children under 18 are free.
 - C. The registration fee should cover the meeting and hospitality rooms, entertainment, decorations, speaker fees, and miscellaneous food items for the meetings and in the hospitality room.
2. **Banquet Fee:**
 - A. Fee is calculated using per person price of meal plus gratuities and taxes. Do not underestimate fee charged to member.
 - B. Choice of meals and children's meals may have different costs per person.
 - C. Banquet should be self-funded
3. **Excursion Fee:**
 - A. Usually an optional fee, this may include entrance, transportation and/or food fees per person.
 - B. Excursions should be self-funded.

Registration, banquet and excursion fees must be paid with registration. The registration fees can only be changed by a Board vote.

Other Costs to Reunion Attendees:

1. Lodging
2. Food, transportation, entertainment and personal excursions not paid with registration

Any refunds for reunion registration, banquet and/or excursions shall be approved by the Board depending on individual circumstances of cancellation. No refunds later than four weeks prior to the reunion will be issued once banquet reservation numbers have been turned in and fees pre-paid for transportation or excursions.

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Other Costs to TFA:

1. TFA shall budget \$500* to cover reunion administrative expenses including, but not limited to, name tags, participant packets, ribbons, programs, agendas, and other office supplies as needed. (This amount is included in the 2-year TFA Budget under Reunion Expense.)
2. TFA shall budget up to \$500* from previous year's reunion receipts for additional fundraiser items and attendee favors/small gifts. (This amount is included in the 2-year TFA Budget under VP Expense.)
3. Any required prepayment or deposit shall be made by the president or treasurer with either a TFA check or debit card. TFA does not have a credit card.
4. All expenses to be reimbursed for the reunion shall be submitted to the treasurer within three months after the reunion - any reimbursement requests made after the end of the fiscal year, June 30, following the reunion will not be reimbursed.
5. Registration fees should cover the meeting and hospitality rooms, entertainment, decorations, speaker fees, hospitality room snacks, meeting coffee break, etc.
6. Banquet and excursion fees should be self-funded.

Fundraising at Reunion:

1. The VP oversees all fundraising at the reunion.
2. Anyone may donate items for a fund raiser - please note that TFA is a 501(c)7 organization and donations are not tax deductible.
3. The VP may use the VP expense budget for additional fundraiser items.
4. All proceeds are used to cover reunion expenses not covered by registration fees. Any excess proceeds shall be included as TFA Income.

***All Budgeted expenses are approved by the Board and the General Membership at the Annual Meeting every 2 years.**

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HOTEL

The goal for a group room rate is to get the best deal possible for the attendees, who will make their own reservations, and pay for all their own hotel charges.

FIRST PRIORITY is **setting the dates and confirming the hotel arrangements**, bearing in mind that the location and the time of year can affect prices.

Things to find out:

1. What is the hotel policy about adding rooms to the room block, if more are needed?
2. What is the cut-off date when the block of rooms will be released if not sold?
3. Will the price quoted be honored for people who arrive early or stay late?
4. Is there a fee for daily parking?
5. Is breakfast included?
6. Is it handicap accessible?
7. What is available for a **Hospitality Room**? Fee?
8. Ideally, you would want the room available from first day-afternoon (or evening before) for registrations and socializing, until last day-morning; but if there is a fee, you might want to reduce this.
9. What are the choices for **Meeting Rooms**? Fees?
 - A. **Board Meeting** first day-afternoon or evening 2-3 hours, with seating for 10-12 with a long or round table.
 - B. **Annual Membership Meeting** 2-3 hours.
 - C. Estimate seating needed - people really like to have tables to sit at if there is space. Lectern and microphone may also be needed for this.
 - D. **Workshop Space** probably is best if it's set up in the Hospitality Room. Not everyone will attend, but most will.
 - E. You may need to figure in the expense of a microphone and podium, if needed.
10. What is available for a **Banquet Room**? Fee?
 - A. Check banquet room capacity, set-up, and banquet dinner menu selections.
 - B. Remember to add into the banquet costs, any sales/meal/local taxes plus the gratuity (at least +30%), before figuring out the all-inclusive cost per person, which will be included on the registration form for pre-payment.
11. What is the capacity of the **Restaurant**, if there is one? How is the service?
 - A. Can this be considered as an alternative to a dinner banquet, to have a luncheon banquet? (As another option, consider looking into a catered picnic, lunch or dinner elsewhere?)
12. Does the Hotel require a **Formal Contract**? Be sure to review it for any requirements for minimum hotel rooms booked, and minimum number of banquet meals, along with any attrition clauses for both rooms and meals. (This type of stipulation would require TFA to have to pay for any cancelled or unbooked rooms and meal costs within the required contract's attrition minimums.)

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SPEAKER:

The reunion chair chooses the speaker. The speaker is usually invited to the banquet and receives a complimentary meal. Some speakers may request that transportation be arranged to/from the banquet; and some traveling from a great distance, may ask for an overnight stay. Transportation and overnight stay costs need to be **approved by the Board** before agreeing to cover these expenses. Any such costs would need to be factored into the overall **Banquet Fee** charged per person. Generally, the speaker is given a donation from TFA to his or her charity or cause. Confirm the speaker's topic and make sure that he/she speaks for no longer than one hour. Find out what equipment he/she will need. Hotel A-V equipment fees tend to be very high, and if necessary, will need to be figured into the overall Reunion Budget. Confirm all agreements in writing copying both the president, vice president and treasurer.

EXCURSIONS:

The reunion chair may plan day trips to visit Towne family sites and/or sites of interest to the membership such as genealogical research centers or those with historical/cultural significance. All excursions are optional.

Factors which need to be coordinated include:

1. **Transportation** – hiring a bus or van (price factored into excursion cost); carpooling
2. **Food** – If at a meal time, is food available at the site for people to purchase on their own? If not available on site, possibly provide box lunches? (prepaid and included in excursion cost.)

Collect any entrance fees, transportation costs, and/or food costs with the **Excursion Fees**. These are non-refundable beyond 4 weeks prior to reunion.

Be sure to include such details as proper attire, transportation and food options, and refund cut-off date on the registration form and in *About Towne*. Remember that excursions are self-funded. Confirm all agreements in writing copying both the president and treasurer.

VOLUNTEERS: Arrange these in advance and be sure to have enough volunteers.

1. **Registration**: At least 2 people are needed to help people check-in, put together and hand out reunion packets, name badges, etc., and answer questions.
2. **Hospitality Room**: 1 or 2 people will need to be available during all times when the hospitality room is open to meet with members and answer questions. They can also take care of the purchase of any TFA sales items and sell tickets for raffle/silent auction items.

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3. **Raffle/Silent Auction**: The VP is in charge of the Raffle/Silent Auction. If holding a raffle, one or more people will be needed to sell tickets.
4. **Photographer**: At least one person is needed to take photos of all activities for submission to the newsletter editor for inclusion in the quarterly newsletter. Have all the names associated with the photos.

FINAL THOUGHTS

Things that must be included in reunion.

1. Board Meeting
2. Annual Membership Meeting

Things that should be included in reunion

1. Banquet
2. Speaker
3. Genealogy workshop / sharing family research

Things that may be included in reunion

1. Excursion(s)