

ASURA Retirees Day Committee

This material was prepared by Barry McNeill in March 2013.

General Information

The purpose of the Retirees Day Committee is to plan, organize and deliver Retirees Day.

A. Membership

1. ASURA members who indicate an interest on annual membership form
2. ASURA members who have participated in meetings
3. No minimum or maximum number but 6-7 is a good number
4. No requirement of quorum

B. Meetings

The first meeting is held in late August or early September. This is generally followed by another meeting in September followed by single meetings in October, November, December, January, February, and March. The meetings have generally been held to one hour in length.

C. Chair Responsibilities

The chair is appointed by ASURA Board President in accordance with bylaws and is an Ex-officio member of Board,

1. Coordinates work of committee (see following Task List)
2. Schedules committee meetings
3. Presides at committee meetings
4. Provides monthly report at ASURA Board meetings as needed
5. Review and update Retiree Day process (i.e., this document). Note: Any change requests should be sent to the [Technology Manager](#).

D. Retirees Day Task & Task Description Tables

The material on the following pages reflect the tasks, task descriptions, task responsibilities and task due dates as suggested by Val Peterson (2010) and modified by Barry McNeill (2011, 2012, and 2013). The ASURA Office has a CD with the complete documentation of the work done by the 2011-2013 Retirees Day Committees.

ASURA Retirees Day Suggested Task List

Task #	Task	Due Date	Committee Responsibility
1	Selection Event Topics	Mid October	Committee
2	Presenter Contact		
2.1	Confirmation	Mid November	Various Committee Members
2.2	Presenter Information	Early December	Various Committee Members
2.3	Presenter confirmation letters	Early January	Committee Chair
3	Publicity		
3.1	<i>Prime Times</i>	Fall / Winter	Committee Chair or designee
3.2	Wild Apricot Event Defined	Early January	Committee Chair
3.3	External to ASURA	Mid January	Committee Chair or designee
3.4	Not Used		
3.5	E-mail Announcements	Mid January	Committee Chair
4	Registration		
4.1	Update Registration Materials	Early January	Committee Chair
4.2	Not Used		
4.3	Online Registration Begins	Mid January	Committee Chair
4.4	Not Used		
4.5	Track Registration	Early February	Committee Chair or designee
5	Pre-Event Tasks		Donna / Mary
5.1	Arrange for Photographers	Mid December	Committee Member
5.2	Establish Registration Fee	December Meeting	Committee
5.3	Assign Presentations to Sessions	December Meeting	Committee Member
5.4	Assign sessions to rooms	Early February	Committee Member
5.5	Parking Issues	Mid January	Committee Member
5.6	Prepare Day of Event Materials	Mid January	Committee Chair or designee
5.7	Update evaluation form	Mid January	Committee Member
5.8	Print Event Day Materials	Early February	Committee Chair /Zeke Prust
5.9	Request room setup from MU	December Meeting	Committee Member
5.10	Prepare Presenter Packets	Week before Event	ASURA Office Staff
5.11	Prepare Name Badges	Week before Event	ASURA Office Staff
5.12	Pay MU Room Charges	Mid February	ASURA Business Manager
6	Catering		
6.1	Select Menu	November Meeting	Committee Member / Committee
6.2	Establish event food cost	December Meeting	Committee Member / Committee
6.3	Submit catering request to MU	Mid January	Committee Member
6.4	Tell MU head count	no later than noon three working days before the event)	Committee Chair or designee (e.g., ASURA Office Manager)
6.5	Seating Arrangements (completed by 2/15)	Mid February	Committee Member
6.6	Pay catering bill	Completed when final count sent in to MU	ASURA Business Manager

ASURA Retirees Day Suggested Task List

Task #	Task	Due Date	Committee Responsibility
7	Day of Event		
7.1	Pick up event day materials	Friday before event	ASURA Office
7.2	Room Preparation	Event Day	Committee Members
7.3	Running a Session	Event Day	Committee Members
7.4	Set up registration table	Event Day	ASURA Office
7.5	Staff registration table	Event Day	ASURA Office
7.6	Photography	Event Day	Committee Member
7.7	Pass out/ collect Evaluation Forms	Event Day	Committee Member
7.8	Clean up	Event Day	Committee Member
7.9	Scripting the Day's Events	Event Day	Committee Member
8	Post Event		
8.1	Evaluate & summarize evaluations	Early March	Committee Member
8.2	Thank you letters	Late February	Committee Members
8.3	Prepare draft final report	Before March Meeting	Committee Chair
8.4	Final Committee Meeting	Early March	Committee
8.5	Prepare final committee report	Mid March	Committee Chair
8.6	Prepare short report for Annual Report	Mid March	Committee Chair

ASURA Retirees Day Task Description

Task #	Task	Possible Process to Complete Task
1	Selection of Event Topics	
1.1	Luncheon Speaker / Program (completed by 11/15)	<ol style="list-style-type: none"> 1. Brainstorm a list of possible luncheon speakers or programs. The luncheon speaker or program is one of the attractions to the event and so while the luncheon program is not the most important part of the event it is helpful to have someone something that is well known or is going to talk on a topic of universal interest. 2. Discuss the list and select the top couple of candidates 3. Discuss the best way to approach the candidate and implement the plan developed (e.g., a committee member knows a person who can make the request) and implement the approach. 4. If there are difficulties consider the possibility of using one of the session topics as the luncheon speaker.
1.2	Session Topics (completed by 10/11)	<ol style="list-style-type: none"> 1. Review the previous year's program to get a sense of what was done 2. Individually and as a committee brainstorm a set of possible topics. A list of at least 30 topics would be reasonable. There should be a possible presenter for each topic. 3. Categorize the topics (e.g., Current Events, Academic, Financial, Cultural (art, music,), Health, History / Government, Senior, Energy / Sustainability, and Miscellaneous 4. Select the top 10 topics (multi-voting is one way to do the voting). If possible let the ASURA Executive Committee also vote. It might even be possible to try using something like Survey Monkey to poll the ASURA membership. 5. Review the categories to ensure some balance and select eight topics with two in reserve.
2	Presenter Related Tasks	
2.1	Confirmation (completed 11/15)	<ol style="list-style-type: none"> 1. Assign each topic to a committee member 2. Each committee member checks with a potential speaker / presenter to see if they are interested in participating and then if they are free on the event's date. 3. If a potential speaker / presenter is not available, the committee will select one of the back-up topics and/or suggest another possible presenter.
2.2	Presenter Information (completed 11/15)	Each committee member will complete the Speaker / Presenter Information Form (see material at end of matrix) for each session they have been assigned. This includes determining if they and a guest will be attending. If there is a guest we need to get the name so they can have a badge.

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Task #	Task	Possible Process to Complete Task
2.3	Presenter confirmation letters (completed 1/1)	Using the Confirmation Letter Template (located after Task Description Matrix), a draft confirmation letter is prepared for review by the presenter's host. Once approved the confirmation letter is sent to each presenter and the luncheon speaker. This letter contains information about the session and thus cannot be sent until Task 5.3 has been completed. In addition to the letter the package sent to the presenters should include a map of the campus and second floor of the MU and a copy of the latest version of the Speaker Information table for a final review and approval.
3	Publicity	
3.1	<i>Prime Times</i> (see <i>Prime Times</i> publishing schedule submission dates)	The date of the event can be published in the fall issue. If the spring issue comes out before the event then there can be a big spread with the speakers and some detail about the talks.
3.2	Wild Apricot Event Defined (up by 1/1)	<ol style="list-style-type: none"> 1. By 09/01 make sure the event date is shown in the ASURA web site (skeleton definition of event on Wild Apricot) 2. After all the session topics and speakers have been confirmed (Task 2.1) & assigned a session, the luncheon choices completed (Task 6.1) and the event cost established (Task 5.2) update the Wild Apricot Registration Types 3. Upload registration form once Task 4.1 is completed
3.3	External to ASURA	At a fall 2013 Board Meeting approval was given to advertise the event more globally. The following organizations were sent event materials: Emeritus College (E-Card), Retirees Associations at NAU and UA, faculty wives, and New Frontiers.
3.4	Not Currently Used	
3.5	E-mail Announcements	Wild Apricot has three event announcement e-mails that can be sent.
3.5a	First Announcement (1/15)	This announcement is sent out about 6 weeks before the event. The announcement will be the President's letter (see Task 4.1 with links to the online registration site, a registration form, and the program details.
3.5b	Second Announcement (1/25)	This announcement is sent out about 10 days after the first announcement
3.5c	Third Announcement (2/10)	This announcement is sent out about 10 days after the second announcement.

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Task #	Task	Possible Process to Complete Task
4	Registration	
4.1	Update Registration Materials (completed by 1/1)	<ol style="list-style-type: none"> 1. A registration form is necessary for those members who do not want to register online. 2. Once the event agenda has been established (Task 5.3) and the registration fee set (Task 5.2) the registration materials can be prepared and uploaded to Wild Apricot. The registration materials consist of a letter from the ASURA President inviting the ASURA members to the event, a registration form, and a Full Day Program which includes a short summary of the session topics and the luncheon program. Samples of these three documents are included following the matrix. The form requests contact information only for non-members (member contact information is in the ASURA data base). Since we are no longer mailing event information (Board Meeting May 2012) there is no constraint on the length of Present's letter or the full day program. The registration form should be one page to accommodate return mailing to the ASURA Office. 3. The registration deadline should be the Friday a week before the event to accommodate slow mail which dribbles in several days after the deadline. This can be set as part of the definition of each Registration type in Wild Apricot.
4.2	Currently not used	
4.3	Online Registration Begins (1/15)	Registration is enabled in Wild Apricot
4.4	Currently not used	
4.5	Track Registration (continuous from 1/15 until the event)	As the registration forms come into the ASURA office the office staff enters the names and other data into an Excel spreadsheet. The applications are copied and placed in a folder which is held in the office. The original forms and checks are sent to the ASURA Business Manager (Carolyn Minner) who will deposit the checks and update the database to reflect attendance.
5	Pre-Event Tasks	
5.1	Arrange for Photographers (completed 11/15)	Contact ASURA member(s) who like to take event pictures. It is worthwhile to remind these photographers a week or so ahead of the event.

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Task #	Task	Possible Process to Complete Task
5.2	Establish Registration Fee (established by 12/20)	<p>The event needs to be as self-sufficient as possible, i.e., the Registration Fee needs to cover the cost of the event. The two major costs are the food (morning coffee klatch / luncheon) and the MU room charges. There may be some other costs which crop up (e.g., external printing, luncheon cost for luncheon and session speakers and guests). Once the food cost and room charges are known (Task 6.2 & 5.9) and an estimate of the attendance is made a per person Registration Fee can be calculated.</p> <p>The inclusion of room charges is new starting 2013. The fees would have been \$1270 for 2012 or about \$12.70 /person if we had not gotten a waiver. To help keep the registration fee low the 2012/13 ASURA Board approved \$750 support for the event. In addition the Board approved \$200 to cover the presenter's luncheon.</p> <p>Registration Fees: 2010-2012 - \$25/person (no room fees charged)</p>
5.3	Assign Presentations to Sessions (12/20)	Once Task 2.1 is complete review the topics and decide which topics go in the first and second session. Consider the expected popularity as well as the topic type (i.e., current events, health, etc.) in making the decision. Be sure to incorporate any session restrictions contained in the Speaker Information Forms (Task 2.3)
5.4	Assign sessions to rooms (completed by 1/1)	Once Task 5.3 is complete appropriate rooms can be assigned to the various sessions. The decision is based on expected attendance and perhaps the speaker needs (Task 2.3)
5.5	Parking Issues (completed 1/12)	Contact Parking Services to determine if there will be a parking issue with other events on the day. The possibility of arranging for a cart to help those ASURA members who have some disabilities should be checked out and arranged for if possible.

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Task #	Task	Possible Process to Complete Task
5.6	Prepare Day of Event Materials (completed by 1/17)	<p>Event Day Program: The event day program needs to be updated which can be done once Task 5.4 is complete. A starting point is the previous year’s Event Day Brochure. A sample brochure is included in the materials following the matrix. The brochure must be held to two pages.</p> <p>Signage: There are a number of information signs needed for the event. This task requires: a) defining the signage needed (e.g., registration, session topics / speakers) and b) preparing the signage for printing. Part b can be done only after room assignments (Task 5.4) have been completed.</p> <p>Note: If the event is held at the MU then there are sign holders by each room otherwise there are 8.5 by 11 stanchions available and the signs slip into the stanchions.</p>
5.7	Update evaluation form (completed by 1/17)	<p>Each year the attendees are asked to evaluate the the sessions as well as the luncheon. The form also has space for suggestions for improvements and future speakers. On occasion some additional questions about future Retirees Day are included. This task should be assigned to two members at least one of whom is comfortable with Excel. These two members will eventually be the two to process the forms and generate some summary tables (and maybe plots).</p>
5.8	Print Event Day Materials (sent out for printing 2/5)	<p>This task needs to be coordinated with ASURA Office Staff working with ASURA Office Manager, currently Carol Moore. The materials that need copying include:</p> <ul style="list-style-type: none"> a) the signage – historically this has been done by Zeke Prust. The committee liked the signage format created by the committee and recommends sending this to Zeke rather than letting him define the format. In 2012 the committee chair printed the signage and brought to the event b) the Event Day Brochure – again this has historically been handled by Zeke Prust (zaprust2@juno.com). In 2011 the process was to create a 4 page folded pamphlet using Word, create a PDF file which was copied to Disk. The disk was sent to the ASURA office where Zeke picked it up. c) the evaluation form – this has been printed in house on colored paper. In 2012 the chair had this form printed two sided at Kinko’s. d) the luncheon seating placards – it turns out that the MU has what we need (Reserved Table) and there is no need to print anything special for the luncheon

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Task #	Task	Possible Process to Complete Task
		seating (see item 6 in 01/13/2011 minutes).
5.9	Request room setup from MU (completed by 12/15)	<p>Using the information obtained in Task 2.2 and the estimated luncheon attendance the MU must be contacted to arrange for the various needs which includes information on how many chairs, tables, type of tables, the arrangement of the tables, any drapes for the tables, and the electronic needs (microphone, data projector, etc)</p> <p>According to Carol Moore the process for getting our MU room requests into the MU is as follows:</p> <ol style="list-style-type: none"> 1. The committee chair or designated member along and Judy Schroeder (JUDY.SCHROEDER@asu.edu) of the MU develop a list of room needs. This is done either in person or via e-mail 2. The needs define what we want the MU staff to set up: exact equipment needed, etc. in each room, number of chairs in each room, rounds and chairs in Ventana. 3. A template for completing this task is found at the end of this matrix. Samples of previous years' requests are available in the event files. 4. After Judy gets our instructions she prepares a formal confirmation form which we proof, and if OK, send a copy to ASURA Business Manager, Carolyn Minner, who signs and faxes back to Judy. 5. The form needs to be signed 2 full working days before the event, i.e., by Wednesday noon (or earlier). 6. A few notes from Judy about room requests: <ol style="list-style-type: none"> a. Catering will add tables to Cochise based on what they need to accommodate their menu so you don't need to request tables for catering b. The La Paz room is small enough that no microphones will be supplied c. The smaller rooms don't have mics attached to the podiums so the wireless handheld is booked for you. Each of these rooms can have one handheld and one lav. d. If a stage is needed at lunch there is power available at the back of the stage e. The presentation rooms have sign holders beside their doors which can hold 8.5 by 11 sign. Stand alone stanchions which hold 8.5 by 11 paper can be ordered for special signs (e.g., registration, luncheon).

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Task #	Task	Possible Process to Complete Task
5.10	Prepare Presenter Packets (Prepare by Friday before event)	<p>The speakers Packet is picked up by the speaker on the event day has been prepared by the ASURA Office staff (confirm with ASURA Office Manager, currently Carol Moore) and typically includes a file folder containing:</p> <ul style="list-style-type: none"> • Name of presenter on file folder • Printed Day of Event Program • Presenter name badge • Presentation Room & Number (and session) • Map of MU Second Floor • A copy of the latest copy of Prime Time
5.11	Prepare Name Badges (Prepare by Friday before event)	<p>There are two steps associated with preparing the name tags. Once the registration closes (Task 4.4) the name badges can be created. This task is handled entirely by the ASURA Office Staff and involves the following steps:</p> <ol style="list-style-type: none"> 1. Using an Excel sheet listing all names badges for attendees are made. If the person has attended past events they will already have a badge in the ASURA office and that badge is used. If there is no old badge a new badge is created. Joan Leard has done this task for the past couple of years. The names should be large filling the badge 2. Small colored dots are placed on the name badges for each attendee who has requested the veggie meal
5.12	Pay MU Room Charges	As mentioned in Task 5.2 ASURA now has to pay room charges. The Business manager gets an invoice and pays the MU.
6	Catering	
6.1	Select Menu (completed by 11/15)	There are two main menu items: 1) the food for the morning coffee klatch and 2) food for the lunch. In discussion with a representative of the Memorial Union Catering (Colleen was contact in 2010) develop a menu including cost. Typically the previous year's menu is the starting point with any suggestions from the previous year used to make any modifications.
6.2	Establish event food cost (completed by 12/20)	The MU will supply a cost for the proposed menu. An estimate of the attendance will be needed since the morning menu is a fix quantity of food. In 2011 there were 122 lunches (106 registered attendees and 16 presenters and guests).

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Task #	Task	Possible Process to Complete Task
6.3	Submit catering request to MU (submitted by 1/15)	<p>The catering request besides defining the menu includes some rather detailed information about the catering service we desire (e.g., when the lunch tables are set, the location of the morning refreshments, the type of water service we need in each presentation room, do we want table clothes / linens, when the food should be served). Once menu and other items have been established a formal request with PO is sent to MU Catering by the ASURA Business Manager. The formal request must be received by Catering before noon two working days before the event (Noon Wednesday). Final attendance and quantities must be submitted to Catering by noon three working days before the event (Tuesday)</p> <p>It seemed to be difficult to get the type of water service we wanted in each presentation room (e.g., a pitcher and glass) so the committee decided to bring bottled water for the speakers (which is what all the speakers asked for anyway).</p>
6.4	Tell MU head count (no later than two days before the event)	<p>MU catering must be informed by noon at least two working days before the event of the final head count. Note: There are typically a number of no-shows which means ASURA pays for meals not used. It is suggested the committee submit a count somewhat below the “expected” total. This worked very well in 2012.</p>
6.5	Seating Arrangements (completed by 2/15)	<p>There are several tasks associated with the seating arrangements.</p> <ol style="list-style-type: none"> 1. Who sits at the head table must be established. Typically it would consist of the luncheon speaker(s) their guests, if any, the current president of the ASURA, and the person introducing the luncheon speaker. If the table is not yet filled then others can be assigned. 2. Historically special tables toward the front have been reserved for the session presenters and their guests (and probably those who introduced the speakers). For the 2011 event it was decided it would be better to have the session speakers and their guests distributed throughout the room and hence there was no need to have any additional reserved tables (see item 7 in 01/13/2011 minutes).
6.6	Pay catering bill (completed when final count sent in)	<p>Working with the ASURA Business Manager submits check to MU at the time the final count is given to the MU.</p>

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Task #	Task	Possible Process to Complete Task
7	Day of Event	
7.1	Pick up event day materials to bring to the event (completed the Friday before event)	<p>Typically the ASURA Office Staff bring all the materials to the event and get the registration area set up The needed materials are:</p> <ul style="list-style-type: none"> • Name Badges, • ASURA Table Drape, • Presenter Packets, • Event Day Brochures, • event signage, • a dozen ASURA envelopes (for thank you letters), • the evaluation forms and • golf pencils to aid in filling out the evaluation forms. <p>Note: For the past several years Zeke Prust has taken care of printing the Event Day Brochure. In past years Carol met Zeke at Friendship Village on the Friday before the event to pick up these items. In 2011 the printing was done early and the materials were picked up several days in advance of the event. In 2012 Zeke brought the materials directly to the event.</p>

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Task #	Task	Possible Process to Complete Task
7.2	<p>Room Preparation (presentation rooms set up should be completed by 8:45 a.m., the Ventana completed sometime before lunch)</p>	<p>Setting up the rooms requires:</p> <ul style="list-style-type: none"> • Cochise Room (committee member) – this room needs to be checked only to make sure the food and drinks are in place and that there is room to move about. Also the appropriate signage should be posted showing registration and food. • First Session (three committee members, one for each presentation) <ul style="list-style-type: none"> • make sure the projection equipment is running, • get water for the speaker, • post the room signage, and, if necessary, • obtain the MAC adaptor from the Building Management desk (near Pima). • Second Session (three committee members, one for each presentation) • Third Session (three committee members, one for each presentation) • Ventana Room <ul style="list-style-type: none"> • (committee member) make whatever arrangements are needed for the luncheon program (amplifiers, audio visual, etc.). • (committee member) will keep an eye on the setting up of the tables to make sure the MU is doing what we asked them to do.
7.3	<p>Running a Session</p>	<p>Each session is hosted by one of the committee members. The host has the following responsibilities:</p> <ul style="list-style-type: none"> • Collect the presenter from the Registration Table if the presenter has not already arrived at the room • Help the presenter connect their laptops to the projection equipment and show the presenter how to operate the system • Introduce the presenter to the audience • Note the approximate attendance for use during the evaluation of the event • Keep track of time to make sure the presentation ends on time • Thank the presenter for his/her presentation and let the audience know it is time to move to the next event (session 2, 3 or lunch) will be begin in 10 minutes.

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Task #	Task	Possible Process to Complete Task
7.4	Set up registration table (completed by 8:15 a.m.)	The registration table is set up outside the morning assembly room. The table includes the ASURA Table drape, name badges, Event Day Brochures, and various ASURA literature, e.g., information on ASURA trips and other scheduled events. This task is typically done by the ASURA office staff
7.5	Staff registration table (8:15 – 11:30 a.m.)	The table is typically staffed by one or two of the ASURA office staff
7.6	Photography (completed by 9:00 a/m/)	The committee chair should discuss with the photographers what type of pictures should be taken. Typically pictures of each speaker in their room, the luncheon program presenter(s), and numerous shots of members during the morning session.
7.7	Pass out/ collect Evaluation Forms	Committee member will place copies of the evaluation form on each chair in the luncheon room and puts some pencils on the tables to aid in filling out the forms. The pencils are new in 2012. Committee member will collect all the forms after the event closes.
7.8	Clean up (done at conclusion of event)	The following specific things should be done: <ul style="list-style-type: none"> • The committee member hosts for the second sessions should clean-up the presentation rooms making sure to get the water bottles out of the room and remove the signage. • Committee member will check the Ventana Room to make sure there are no name badges, pencils or evaluation forms left on the tables. The evaluation forms should be given to Committee member and the pencils to the office staff. • Committee member will check the Cochise room to make sure it is clean and that no umbrellas, hats, etc. have been left there. • The Office Staff may need some help getting all the registration desk materials ready for transport back to the office (most for recycle).
7.9	Scripting the Day's Events (completed by 2/14)	A detailed script for the day needs to be created. A sample script for the 2012 event is included with the appended documents.
8	Post Event	
8.1	Evaluate & summarize evaluations (before March meeting)	The evaluation forms need to be processed. At a minimum a table with the average response for each question needs to be developed. Further processing and presentation of the results may be desirable depending on the questions.

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Task #	Task	Possible Process to Complete Task
8.2	Thank you letters (1-2 days after the event)	A thank you letter (see sample following the matrix) needs to be sent to all the presenters and the luncheon speaker as well as the various ASURA staff who helped with the event logistics. The letters for the speakers are prepared and sent by the speaker's host the remainder of the letters are written and sent by the chair.
8.3	Prepare draft of final report (complete draft before final March meeting)	A final report for the committee summarizing the events of the year needs to be written. A draft can be discussed at the March meeting.
8.4	Final Committee Meeting (two weeks after the event)	<ol style="list-style-type: none"> 1. discuss evaluations 2. discuss partial draft of final report 3. discuss recommendations
8.5	Prepare final committee report	Based on comments at last meeting the draft final report is prepared and sent to the committee members.
8.6	Prepare short report for Annual Report	ASURA requires a short (1/2 page) written report. This is typically taken from the Final Report and summarizes the event (e.g., the attendance, the program, and the cost). There might be some of the committee's recommendations. The report is due to the ASURA President by the March Board Meeting.