

District Conference Review Committee
Pricing and Approach
Report to Board of Directors
January, 2016

Task Force Members

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Background

The Board of Directors for District 7820 established a task force to review the approach to district conferences. The terms of reference and membership for the task force were set and a report of the findings was due by April 30, 2016.

The motion was in response to a request from the Rotary Club of Charlottetown Royalty. The District Conference was last studied in 2002 and the recommendations in the report written at the time have largely been adopted.

Training for Presidents Elect and Secretaries Elect had evolved over the past number of years to include distance education techniques and local mini conferences. Training is now spread over the time period beginning in February and culminating in a final face to face meeting at the time of the District Conference. The cost to District of this training has been reduced significantly while being made more effective. The conference is the final and important launch point for the new club leadership going into the new Rotary year.

Follow up surveys of the past three conferences have been very positive and little concern has been expressed by the membership.

Rotary International requires Districts to hold an annual conference. It is important that the purpose of the District Conference be clearly defined. From the standpoint of the District Leadership, the conference has a number of purposes.

- The District Conference is an opportunity to Inspire and educate Rotarians. This is particularly important for Rotarians taking on the critical leadership roles in the Clubs and who will be called upon to move their clubs forward.
- The District Conference is an important opportunity to celebrate Rotary in the District, acknowledge the success of clubs and individual Rotarians and highlight the important contributions that have been made to the objectives of Rotary.
- The District Conference is an excellent time to conduct the necessary “business” of the district in an open and transparent way in the form of the members’ Annual General Meeting.
- The District Conference is an important opportunity for Rotary Clubs in the host area to develop leadership skills in creating and managing a successful conference.

- The District Conference is an important opportunity to develop the Rotary Friendships that will last a lifetime.
- The District Conference is an important opportunity for those involved in the various youth programs (YE, Interact and Rotaract) to get together and meet with each other and interact with Rotarians from all over the district.

Scope of the Study

The task force was asked to analyze the current configuration of the District Conference (Thursday evening to Sunday morning) with recommendations to be made having due regard to the need to continue to meet the objects of the District Conference as stated above.

- With the understanding that the design of the training programs for President Elects and Secretary Elects has been reviewed and continues to evolve on its own and is considered outside the scope of the study. Reference to training may be included in so far as a face to face meeting of all PE and SEs will still happen during the year with the cost being shared by the District and Clubs.
- The costing models for the conference will still attempt to break even after sponsorships and other sources of income are considered.
- Wherever possible a broad cross section of Rotarians should have an opportunity to input into the study.

In addition to the above, we were asked to consider a number of specific questions. To help us answer these, we completed a survey of District membership. The results of that survey has been published on the District website. <http://clubrunner.blob.core.windows.net/00000060083/en-ca/files/homepage/district-conference-committee-survey-results-nov-2015/Conference-Survey-Report3.docx> . We also researched information available on attendance.

Specific Questions

How has conference attendance changed over the last ten years?

The following is registration data we were able to gather. While it is somewhat helpful, we need to be careful in reading too much into this information. There are a number of reasons for this caution:

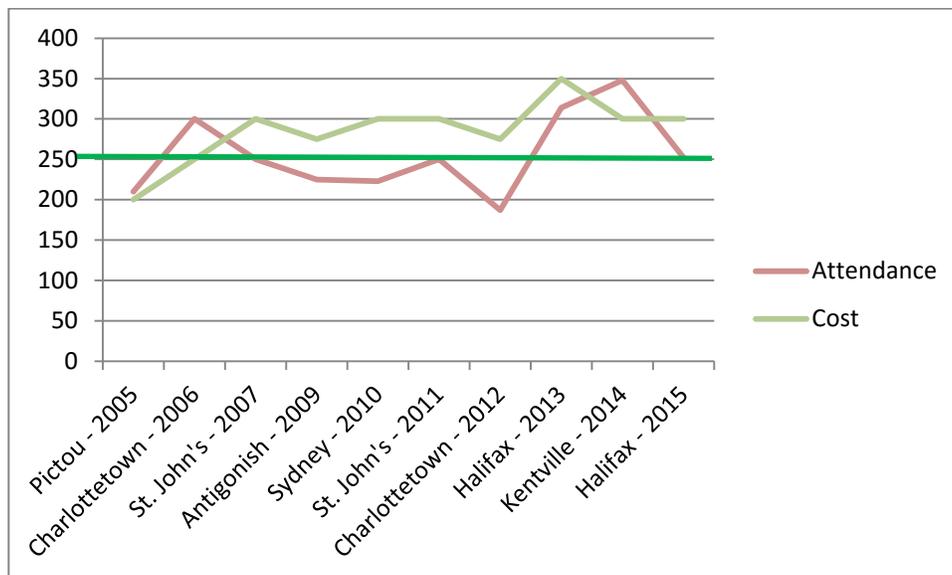
- The District has no ongoing consistent record of conference information. Any records which do exist are in the hands of individual District Governors and/or his/her conference committee. Over the years, much – if not most - information has been lost.
- The level of detail that is available is widely variable, with good data for the last few years and very little from before that.
- Some of the following data is based on memory and must be seen as only reasonably reliable.
- For at least two of the years, there is disagreement on the actual numbers.

Conference Attendance and Cost 2005-2015

Location	Attendance	Cost
Pictou - 2005	210	200
Charlottetown - 2006	300	250
St. John's - 2007	250	300

Antigonish - 2009	225	275
Sydney - 2010	223	300
St. John's - 2011	250	300
Charlottetown - 2012	187	275
Halifax - 2013	314	350
Kentville - 2014	348	300
Halifax - 2015	252	300
Average	256	285

Below is the same information shown graphically. The green line represents the average attendance of 256.

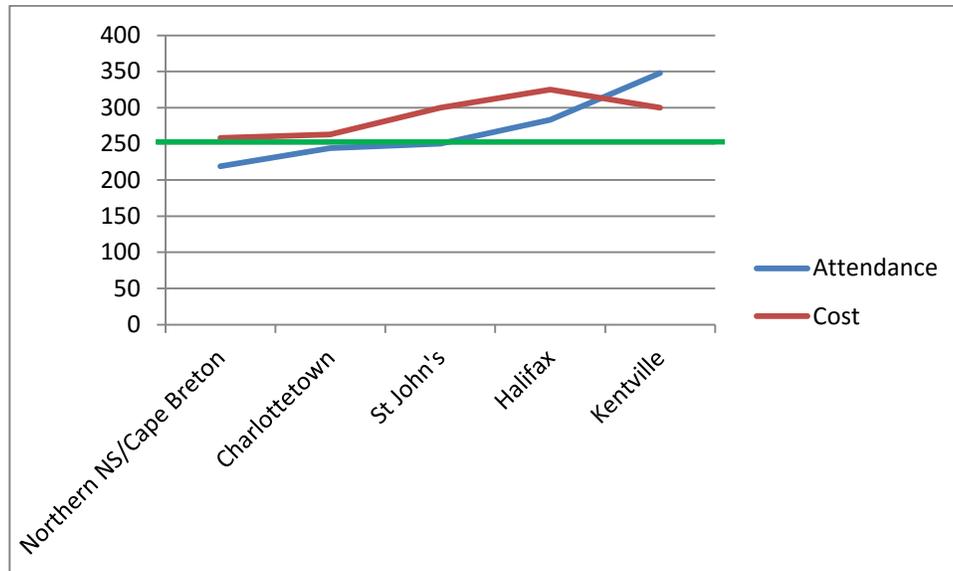


The above appears to show a relationship between attendance and cost. However, if we look at the data according to the regions within which the conferences were held, the picture changes. The tables below show average attendance and cost in the different areas conferences have been held.

Region	Attendance	Cost
Northern NS/Cape Breton	219	258
Charlottetown	244	263
St John's	250	300
Halifax	283	325
Kentville	348	300

As can be seen, the locations with the lowest average cost also had the lowest attendance.

This data is shown graphically below. As above, the green line below represents the average attendance of 256.



These tables imply that attendance drops when conferences are held in less central locations and that cost is less of a factor.

While there are exceptions, attendance hovers around 250 and cost around \$275. In six of the ten years, attendance was roughly at or above the average, regardless of cost. The most expensive conferences have cost \$300. Even so, in only one year at that price did attendance drop below the overall average. Based on the information available to us, we do not have any strong evidence of a relationship between attendance and cost.

It is also important to note that respondents to the conference survey indicated that the time commitment required was at least as important a factor in deciding whether or not to attend the conference.

What conference format is of greatest interest to individual Rotarians and Clubs?

A two day conference was the overwhelming favourite of survey respondents.

What is the best time of year to hold the conference?

Spring is the overwhelming preference of survey respondents.

Are there ways in which information and communication technologies can improve conference format and participation?

Perhaps the best use of technology would be to use it to bring speakers in without having to pay the costs of transportation and accommodation.

Given the desired format(s), what methods/processes need to be put in place to encourage maximum participation?

The feedback from respondents to our survey was very positive about the quality of the conference experience. To improve participation, it is important to increase the focus on promoting the benefits of participation to 'ordinary' Rotarians.

Given the desired format(s), what is the threshold cost (including registration, hotel and travel) that would encourage people to attend?

While cost is important, according to the data we were able to gather, the two least expensive conferences also had the lowest attendance. Time constraints on potential attendees are at least as important as cost. We have not identified a specific 'threshold' cost. However, it will be important in future years to ensure that costs are within a range similar to recent years. While it would be possible to reduce costs by using less expensive venues (universities, camps, etc.) this would result in an event of lower quality and quite possibly result in reduced attendance.

Given the threshold cost and desired format(s), what sort of conference is possible in order to meet RI and District objectives?

A two day conference, as recommended below, will meet both RI and District objectives.

Are the one day or part conference rates effective in meeting the needs of Rotarians wishing to attend on a budget?

See comments above.

The District Conference is now organized by Rotarians from the host club of the District Governor. Is this the best arrangement? What are the alternatives?

See recommendations below.

If the PE and SE only face to face meeting is not to be at the time of the District Conference, what is a reasonable projection of the numbers of Rotarian who would attend the conference?

According to the data we have, average conference attendance when PE and SE were separate from the conference was 235. Attendance for the last few years with PE and SE held along with the conference was 305. This suggests an impact, but without better and more detailed data it isn't possible for us to make specific projections.

Recommendations

We recommend:

1. That the District create a permanent **District Conference Committee**, as recommended by Rotary International and with the following terms of reference:

Committee Purpose

To ensure that the annual District Conference and Annual General Meeting provide Rotarians with opportunities to learn, network, celebrate and be inspired.

Overall Responsibility

The District Conference Committee is responsible for working with the District Governor, other District leaders and the local committee for each year's conference to ensure a successful annual conference and AGM.

Membership

The committee will have the following membership:

- Chairperson (ideally a three year appointment, preferably with experience organizing similar events).
- At least three core committee members representative of the geography of the District, preferably with experience organizing similar events (ideally multi -year appointments).
- Local Organizing Committee Chairpersons as per RI rules.
- District Governor.
- District Governor Elect.
- District Governor Nominee.
- District Trainer.

Specific Duties and Responsibilities

Committee as a Whole:

- Development, in collaboration with the District Office, of Conference Manual of Operations and Policies and Procedures. This would include standards regarding learning, objectives, outcomes, 'institutional memory'.
- Development of the annual conference program consistent with the above.
- Advise local committee and district leadership on budget matters.
- Marketing and promotion, including the engagement of AGs and Club leaders in promotion.
- Cooperate with design and implementation of District wide training plan.
- Annual evaluation, including, but not restricted to
 - *Financial results: cost of Registration, cost of meals, cost of venue, profit/loss*
 - *Attendance: full conference, partners, one day, non Rotarians*
 - *Program: speakers, format, technology*
 - *Facilities: location, service,*

Local Committee:

- Primary responsibility for running the event.
- Provide input to the conference program.
- Logistics (location, facilities, meals, transportation, volunteers, etc.).
- Theme (ensuring consistency with overall purpose).
- Local marketing and promotion.
- Local 'flavour'
- Conference Budget.

2. That if recommendation 1 is adopted, that the District Conference Committee's effectiveness be reviewed after 3 years. This review should focus on at least two areas that were of some concern to the Conference Review Committee:
 - a. Evaluate the Permanent Conference Committee's membership composition and the extent to which the committee has been successful in representing the District's diversity.
 - b. Evaluate the effectiveness of the working relationship between the District Conference Committee as a whole and each local committee. In particular we would want assurances that a consistent centralized approach has not damaged the ability of local organizers to influence the conference program or to add an innovative local flavour.
3. That a Strategic Training Plan be developed to ensure that District Training and District Conference priorities are integrated so as to provide the most effective learning and development opportunities possible.
4. Beginning immediately, that all conference records be maintained in the District office so as to allow continuity and accurate record keeping. At a minimum records should include:
 - a. Financial Results, including
 - i. Cost of Registration
 - ii. Cost of meals
 - iii. Cost of venue
 - iv. Profit
 - v. Loss
 - vi. etc
 - b. Attendance, including
 - i. Full conference
 - ii. Partners
 - iii. One day
 - iv. Non Rotarians
 - v. etc
 - c. Evaluation, including
 - i. Speakers
 - ii. Format
 - iii. venue
 - d. Conference Organization, including
 - i. Committee Names/Responsibilities
 - ii. Manual of Operations (include protocols, standards, etc.
 - iii. Timelines
 - iv. Venue Information
 - v. Vendors, etc
5. That the practice of scheduling the District Conference during the spring of each year continue and that it be for two days, either Friday and Saturday or Saturday and Sunday.



6. Wherever possible, that any PE and/or SE training to be conducted at the time of the District Conference be held within the above two days so as to minimize time commitments required of attendees.
7. That the District Conference Committee review the suggestions made in our survey regarding the use of technology and innovative approaches that might enhance the conference experience.
8. That the District Conference Committee make marketing and promotion of the conference a priority.
9. The District Conference chair serve for a three year term and that he/she have event organization and/or hospitality industry experience.
10. That the District Conference Committee membership include a Rotarian with marketing expertise.
11. That the cost of future conferences continue with the range established over the last few years.