



CATHOLIC SCHOOL CHAPLAINS OF ONTARIO

MISSION

CSCO exists to develop, support, and promote the profession of Catholic School Chaplaincy in Ontario.

VISION

Working in unity with all partners in Catholic education in Ontario, witnessing to the Good News of Jesus Christ.

VALUES

- *Being Christ-centered in all our efforts, decisions and encounters*
- *Unity, joy and collegiality among our members*
- *On-going faith formation and professional development*
- *Advocacy for the vocation and profession of Catholic School Chaplaincy*
- *Collaboration with our partners in Catholic Education*

The CSCO Conference Planning guide

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WHERE TO START - Important Considerations

Catholic Education in Ontario has been receiving full funding since 1985, and CSCO came into existence shortly thereafter. In that time, we have seen school chaplaincy become an integral and active element of the Catholic education system. Chaplaincy Leaders minister to both staff and students in a myriad of ways, with a myriad of demands, in a myriad of settings. The annual conference is our sacred time and place where we gather for professional development, renewal, prayer, camaraderie, and friendship.

Our thanks go to the many planning teams that have volunteered over the years to create, coordinate, and facilitate beautiful liturgies; bring effective and affective speakers to share their wisdom and stories; celebrate memorable social times, and offer quiet times and spaces for us to breathe in God's infinite mercy and presence. We look forward to the many gatherings yet to come!

Chaplaincy groups volunteer to host the CSCO Conference on behalf of the CSCO Executive for its members. During your planning, please keep in mind some of the goals of CSCO and how your planning can help achieve these goals. Ask yourselves these questions:

- How will we implement best practices in event planning?
- How will our conference planning process and conference activities reflect the mission, vision and values of CSCO?
- What are the needs of our members and how will we meet those needs?
- How will our conference reflect and respect the cultures and diversity of our members and professional context (universal church, equity, inclusion, representation, voices of laity and women)?
- How will we reflect the theology and values of the Second Vatican Council?
- How will we prioritize care of creation and ethical practices in our planning process and conference?
- How will we practice hospitality and inclusion at every step in the process including registration and daily life at the conference?
- How will our conference support new chaplaincy leaders?
- How will our conference encourage ongoing spiritual development?
- How will our conference offer opportunities for retreat/personal prayer time?
- How will we support collegiality at our conference?
- How will our conference provide professional development?
- How will our conference provide a balance of spiritual development, collegiality, community building and professional development for our members?

This guide lays out the various elements that have become part of our annual gathering, including tips, suggestions, and ideas for the planning group to consider and discuss. The Conference Team will receive a copy of the Planning Conference Guide when they receive their SEED money cheque from CSCO with an accompanying cover letter indicating that the CSCO liaison will go over the Guide in detail with the conference committee at a specified meeting.

To the current Conference Planning Team:

Thank you for taking on this holy service for your colleagues. May the planning and facilitation of this event be as holy and renewing for your spirits as the conference is for the membership. May the blessing of God be upon us as we continue to live, work, and celebrate this privileged role of Chaplaincy in the Catholic education system.

Your CSCO Executive

PLANNING COMMITTEE STRUCTURE

As a group, determine the roles each team member will satisfy: It is important for the team to recognize that several roles carry great responsibility. Please consider the need for balanced team support. Roles can be combined depending on the size of the team

Chair/Co-Chair(s): coordinate the big picture, keep everyone accountable to necessary deadlines, and have final responsibility. Regular communication with the CSCO executive liaison should ensure that the conference is consistent with the vision and values of CSCO .

Treasurer: responsible for the conference budget, managing expenses, and financial reports. Partners with CSCO Executive treasurer. Preferable that the treasurer has financial skills. See appendix I, page 15.

2nd signing officer: any other member of the team who also has the responsibility to co-sign cheques.

Registrar: keep track of all participants, assign accommodations, meals, nametags, keep contact list, issue confirmations privately to each participant as they register. (suggested not to combine with other roles)

Secretary: keep minutes and notes of all decisions and correspondence

Communications: create and distribute promotional material, liaise with Communications Coordinator of CSCO Executive. The CSCO Communications Coordinator will be responsible for distributing promotions, (created by the planning team) well ahead of the opening of the registration process to the general membership and public. The Conference Planning Team will be responsible for communications with the registrants of the conference.

Liturgist: responsible for prayer opportunities, liturgies and Mass; liaison with local clergy and bishop with respect to Mass.

Emcee: responsible for communications during the conference. Role includes keeping things on schedule, last minute updates and announcements, introductions, directions and awareness of the overall conference plan so as to be able to direct questions to their proper source.

CSCO Executive Officer: is required as a liaison between the executive and planning team and must be fully part of the conference planning team and have full disclosure. The conference planning team will be notified as soon as an executive liaison is appointed to your team and will chair the first meeting for detailed review of the Conference Planning Guide. The Executive Officer will also share the feedback from the most recent conferences in the first meeting. After the first meeting, the CSCO Executive Liaison will remind the committee to facilitate hospitality and welcome as an important component of the conference, respect deadlines at each step of the planning, and assist with communication with the CSCO Executive Team.

General Planning Committee Members: to take on other duties outlined in the Conference Planning Guide, including, but not limited to music coordination, virtual platform coordinator, tech/videotaping, guest speakers, workshop presenters, hospitality, evening entertainment/socials, vendors list, decor Your planning team may choose to assign other roles as they arise.

PREVIOUS CONFERENCES

As you attend the CSCO conferences before yours, take notes! What went well? What didn't? What did you like? What was missing? Take time to review the feedback gathered from previous teams as it provides a wide range of perspectives. At the conference the year before your conference, be prepared to promote your conference with the following information. Theme, location, date, and speaker.

THEME

Every conference must choose an appropriate theme that is consistent with the mission, vision and values of CSCO and the needs of the membership. Having a theme will help the planning team have a focus as they plan.

LOCATION & DATE

The Conference Planning Team should consider the accommodations necessary for those attending the conference in person. Considerations include, the availability of various forms of accommodation (ie.singles/doubles), accessibility, and the physical environment necessary for the conference and workshops. Also of importance is the meal plans available and the ability to accommodate various dietary needs.

The general practice is for the AGM to be included as part of the conference schedule (a 3 hour time frame which is facilitated by the CSCO Executive), but exceptions can be made on a case by case basis in consultation with the Executive. It is assumed that going forward all CSCO Conferences will offer a virtual option for the AGM. (This virtual option is necessary to acknowledge members with a variety of needs, including teaching, financial, family and mobility concerns.) Therefore when exploring venue options, please be cognizant of what the venue offers in terms of bandwidth/internet capabilities. While the content of the Conference (keynotes/workshops/liturgies/banquet etc.) need not be offered as live streams, it is recommended that they be recorded to be shared in the Members Only Zone of the CSCO website, following the conference). Consider whether the venue you choose is consistent with the theme of your conference as well as the mission, vision and values of CSCO.

CSCO is responsible professionally, financially, and legally for each conference, therefore final approval must be given. Exercise good judgment in selecting an appropriate location and time of year in consultation with the Executive Liaison.

SPEAKERS/FACILITATORS/PROFESSIONAL DEVELOPMENT/WORKSHOPS

Well known people need to be booked well in advance of 1-2 years. As a team decide who will be the contact for the speakers. As a team decide who will provide hospitality for the speakers. (Driving them from/to the airport; if an airport limousine will be used; who will answer any questions, do the thank you and presentation of gift).

CSCO is responsible professionally, financially, and legally for each conference therefore final approval must be given by the executive.

If your speaker/presenter is a member of the clergy outside of the local diocese they may need a letter of Good Standing from their Bishop. Please confirm with your local diocese.

CSCO's goals are to provide opportunities for professional development and faith formation. There is a need among our members to be inspired intellectually and spiritually with high quality content. It is up to the Planning team to decide how to carry this out within keynote sessions and/or workshops offered. Information about workshops and facilitator bios should be sent to membership in advance as part of the conference registration package. When considering workshop presenters, remember there are many experts in various fields (not just theology and pastoral ministry) out there in Canada, including among our CSCO membership, many of whom hold a D. Min. or have completed academic research in topics of interest to our school ministry context. Keynote speakers and workshop leaders do not have to be Catholic nor familiar with our Catholic school context to be relevant and helpful to our professional development and faith formation goals.

The topics and guest presenters should reflect the diversity and variety of gifts of our church and multicultural school contexts. Members have consistently requested sessions allowing for sharing of best practices, small group discussions and community sharing.

If you are looking for suggestions for speakers/workshop presenters, a good place to start is to explore speaker series through Catholic Universities, publishers and our partner organizations. If you need further suggestions, contact the CSCO Executive.

Remuneration for speakers, workshop presenters, etc. needs to be included in your budget. It is important to recognize the work that goes into preparing these offerings, whatever remuneration is offered should justly reflect this. The team will need to decide who will do the formal introduction and thank you to the speaker and/or workshop presenters including the presentation of a gift or stipend.

LAYOUT OF SPACE

Wherever the location of your conference, thoughtful use of space is required and should assist in facilitating your overall goals.

Some general questions to consider:

- Will participants be seated around tables in purposeful small groups or lecture style?
- What AV/Technology will be necessary?
- What is the quality of WiFi needed?
- Is there a window in the room (for the purpose of closing blinds or dimming lighting)?
- What is the sound quality and microphones for music ministry in the large room?
- Is the space accessible? etc.

A. Worship space/Chapel

- a. Ritual and communal celebration is crucial to the CSCO Conference. Thoughtful consideration needs to be made as to where the main prayer space will be located within the centre; an appropriate space for Mass; accommodate live music; A/V needs; ease of movement during communion (remove round tables) etc.

B. Main Gathering Area

- a. Prayer Focus (Visual display) in Main Area
This should include elements that reflect the theme for the conference. It can also include reflections of the time of liturgical year; elements that reflect our membership or the history of CSCO; etc.

C. Workshop and breakout rooms

- a. Ensure that the spaces designated for workshops/breakout sessions are set up to suit the purpose/needs of the workshop, provide adequate space, technology and layout.

D. Social Gatherings/Lounge Area

- a. The planning team should designate an area for social gatherings during free time.
- b. It is also necessary to have the Smart Serve Responsible Alcohol Beverage Service Training for the socials. The license you obtain will cover a specific room in the facility. Information is available at www.smartserve.ca. See appendix III for more info on smartserve

E. Dining Area

Meals are a time to encourage community-building. Meals often take longer than expected due to lineups at buffet tables and other large group logistics. Please schedule extra time for meals to ensure members are on time for the post-meal activity.

F. Outdoor Space

Is there an outdoors space for people to gather, or outdoor amenities/trails for people to enjoy.

It is a good practice to provide an indoor facility map (if available) as well as verbal directions and reminder of start time of next activity.

RESPONSIBILITIES OF THE TREASURER

The conference Treasurer must work closely with the CSCO Treasurer. Full financial records must be kept and submitted to the executive when all conference financial transactions are complete. Costing for the conference should be consistent with comparable conferences. It is advisable to offer a variety of conference registration options (commuter, single/double accommodation, etc.)

BUDGET PLANNING

Budget planning is a critical element to the beginning stages of conference planning. It is a detailed process. All steps must be completed and communicated to the CSCO treasurer. See appendix I.

BANK ACCOUNT

All conference transactions will be run through the CSCO account with the assistance of the CSCO Treasurer. The Conference Planning Team Treasurer and team will work with the CSCO Treasurer to arrange payments and deposits.

REGISTRAR

Registration is an important aspect of the conference planning. Once you have all of your information: where, when, what, who, cost, etc. you will need to make a registration form. (Please see Appendix III for template) The registration form needs to include the costs for commuters, full conference and any other variations. If there is a choice for single or double rooms, dietary restrictions or allergies. The registration form needs to include a cutoff date for no refund. Once people register, there needs to be a way of confirming their registration.

TECHNOLOGY

Effective use of technology is essential for any conference. This means great consideration needs to be given to both the technology required for those participating in person, as well as any recordings or live streams that may be part of the conference plan. The experience of previous conference planning teams indicates that the hiring of technology professionals to provide the required services for the conference is money well spent.

Some technology considerations for the in person conference include (but are not limited to):

- quality sound system and access to enough microphones/speakers for various needs (Keynotes, Liturgies, Workshops/Breakout Rooms, Social Spaces);
- quality screens/projection for speakers aids (powerpoints, videos, images, etc.);
- access to quality wifi/internet with enough bandwidth to support conference needs; access to the hardware necessary for conference needs (laptops, speakers, projectors, cords, microphones, amps, etc.)

It should be clear who is providing various technologies for the conference (the venue, the technology provider if hired, speakers, workshop presenters).

Technology considerations for virtual aspects of the conference include (but are not limited to):

- choice of platform for digital access;
- equipment necessary to provide livestream (camera, microphone, lighting, high quality internet access. * **The CSCO AGM needs to be livestreamed.**
- someone to facilitate the virtual platform (monitor the chat, troubleshoot)).
- If you choose to record all or some of the conference to offer video/audio access at a later date on CSCO Platforms (for those who miss the conference), you will need someone to edit and upload those portions in addition to the hardware/software required).

The use of social media to promote the conference and as a tool for gathering and sharing during the conference has become essential. The team should consider how they would like to make use of social media for the conference. It is important that teams work with the CSCO Communications Coordinator to assist with this planning.

*Planning teams should not consider the recommendations in this section of the guide exhaustive. As new technology and platforms become available and accessible, teams are encouraged to incorporate their use into their conference plans.

CONFERENCE SCHEDULE

When planning your conference please take into consideration the following elements (in no particular order):

OPENING AND WELCOME TO THE CONFERENCE

- Territory/Land acknowledgement: Please research the protocols followed for the jurisdiction where the conference is being hosted. Preference should be given to acknowledgements that have been developed with local indigenous peoples.
- Opening prayer/liturgy: This section is meant to be a time of welcome. In addition to a prayer for the success of the conference, this time could include introduction of the planning team, house keeping items, introduction of the theme, an opportunity for “getting to know each other.

AGM

The AGM is the responsibility of the executive. Please allocate a 3 hour time slot. All conference planning team CSCO members should prioritize attendance.

The AGM is of key importance to the ongoing life and health of the organization. It is essential to have this meeting scheduled in “prime time” and to give it a sufficient amount of time so that peoples’ voices are heard in the discussions.

The planning committee must work with the CSCO liaison on the ideal time and date for the AGM.

PRAYER/LITURGIES/MASS

Care and practical considerations need to be made with regards to the prayer opportunities that will be experienced during the conference. It is helpful for the rituals to reflect the theology and spirituality of Vatican II, and using the richness of the Catholic Christian tradition. Liturgies should also reflect the diversity of our membership, highlighting the appropriate roles of laity and in particular women in the ministries of the liturgy. Further, the local Bishop should be aware of any Mass being planned and who the Presider(s) will be. Liturgies are an opportunity for chaplaincy leaders to use best practices in space, music, participation, and inclusivity.

* Planning team invites and communicates with the local Bishop and also is responsible for inviting the Bishop Liaison to preside. If another priest/Bishop is coming to the conference to preside at the Liturgy, the local Bishop needs to be notified for approval.

In addition to Mass, daily dedicated prayer, reflection opportunities, and various forms of prayer/liturgy could be offered. These are wonderful opportunities for Chaplains to demonstrate their creativity and provide meaningful engagement with the Divine and each other.

Other things to consider:

- clergy stipends, travel, accommodation and meals.
- creating a space to promote sacredness of liturgy that is accessible to all (physical layout of room, accessibility aids)

MUSIC

We enjoy utilizing good music in the prayers and liturgies at our annual conference. It is a chance to expose our members/participants to new and different genres and methods. It is essential to ensure that proper attribution and copyright information and/or prior permission is secured, obtained and included in slideshows or handouts. It is illegal and unjust to do otherwise.

If songs are to be reprinted on sheets or in a booklet for the conference, whether it is music and lyrics or just lyrics, it is **NECESSARY** to give proper credit for the copyright on these songs, and with some publishers, to arrange for permission in advance.

It is neither difficult nor expensive to arrange for the use of copyright material for a conference such as ours. Information is on each website how to go about obtaining copyright/permission. For more information on licensing see appendix IV.

In advance of the conference, a call out to musicians is encouraged.

VENDORS

While the availability of online shopping has increased access to relevant supplies for many, access to vendors at our conference has remained a valuable resource to our members, especially those who serve in remote areas.

Having relevant and Fair Trade vendors at our annual conference reminds us that we should always be updating our resources as well as supporting ethical and sustainable companies. Keeping up to date allows us to be relevant, honest and authentic. Feel free to contact Catholic supply stores in the area of the conference and support local entrepreneurs and artisans.

These vendors are usually put in a location where perusal over such items will not detract or distract from the speakers' sessions or workshops. Time is usually allotted in the conference schedule to give members/participants a chance to look over the "fair."

Having a proper balance of vendors is up to the planning team and space available. Vendors can bring resources that complement and/or supplement the theme and focus of the conference. Since they know which speaker will be presenting in advance, they can arrange for that individual's books to be available, in which case, time may be needed for a book signing.

Some things to keep in mind with vendors:

- A phone call or letter of invitation should be made soon after the date and location of the conference have been finalized. A follow-up contact can be made to confirm the invitation and conference details.
- Communicate to the vendors the theme and focus of the conference as well as any keynote speakers and workshop topics. This allows them to bring complementary/supplementary books, items and resources.
- A “Vendor’s Fee” is normally charged to each vendor for the privilege of setting up a display at the conference. For example, in the past vendors have paid \$100.00 with \$50 per additional table if vendors require more space. Not-for-profit vendors generally do not pay. A written agreement is recommended.
- Other considerations: Clearly communicate the availability of meals, and accommodation for vendors including all costs.
- Vendors should not be seen as a replacement for workshops. However, providing time to visit vendors is an important consideration.

BANQUET

The annual banquet is an important highlight to celebrate CSCO and our members. It usually takes place on the last evening together but is not limited to this time. The special meal is the occasion where the efforts and contributions of members are recognized and given honour; where retiring Chaplaincy Leaders are given recognition and where the Brian Halferty Award is given. While the meal is organized as part of the conference, the program is usually planned and emceed by a member of the CSCO Executive (President/Vice President) Special guests are usually invited by the CSCO Executive to attend this meal. These guests may include our partners or representatives of other organizations and members of the ecclesial hierarchy, etc. (CSCO would cover the cost for their invited guests). The conference planning team may also wish to invite special guests (these additional costs would be included in the Conference Budget).

*Please allow sufficient time for the recognition ceremony (this will be coordinated by the CSCO Executive). A sound system (microphone) is needed for the presentations, (potentially a screen as well).

It helps to highlight the importance of the banquet when it is mentioned specifically in the conference registration package. It is recommended that you offer an options for people attending as commuters or not registered for the conference to purchase a banquet ticket.

Ways of making this meal special can include but are not limited to:

- arranging for wine to be served at the table;
- highlighting local food and/or beverages.
- suggesting a theme for apparel or clothing.
- employing special decorations;
- ordering a special cake for occasion;
- encouraging attendance among our members;
- providing community-building activities to encourage mingling and conversation among strangers and to help those who do not feel connected to meet others and feel included.

PERSONAL TIME/FREE TIME/COFFEE BREAKS

Thoughtful consideration should be given to your schedule. It is important to give enough time for people to transition between sessions. In particular, meals need special consideration as it can take time to seat and serve a large group. We have received consistent feedback from members over the years, that having some flexible time built into the schedule, improves their conference experience. This might include “vendor time” and comfort breaks.

SOCIALS

The social times serve as important community building opportunities and an extension of our hospitality. While casual socialization in the evenings after dinner is an option, some structure or more organized activities or themes can help prevent fragmentation and exclusion. There have been successful conferences where the social following the banquet has been more complex with fun themes, group activities and community-building initiatives. It is up to the planning team to decide how and where the social times will be enjoyed, taking into consideration the goal of supporting collegiality, including solo members. Organized activities help to discourage exclusive gatherings. (Eg. Trivia Night, Talent Show, Skits, Games night, etc.)

While alcohol may be served at these events, our intent is to not make money on alcohol and we do charge for alcohol to cover the expenses. We no longer give out free drink tickets so there is no opportunity to collect drink tickets from non-drinkers or absentees for the purpose of excessive drinking. Please review the information on Smart Serve and Liquor License requirements for the Social space

The Conference Planning Committee typically will purchase beverages (both alcoholic and non-alcoholic) and light refreshments for the social times. Confirm requirements with your venue.

SWAG BAG ALTERNATIVES

Swag bags are optional. Please be judicious when selecting items to include in a swag bag balancing needs with environmental stewardship. A “take what you need” table could be a replacement for universal “swag bags”

Some examples of items of need could be:

- note paper (or GOOS paper) and pen/pencil;
- snacks (fair trade);
- toiletry items;
- extra reusable mugs/glasses
- program/schedule for conference,
- book written by the speaker or related to the theme.

Teams are encouraged to reach out to our partners for items to be included. Considerations on the environmental impacts are important. We strongly discourage the use of bottled water. **Remind participants to bring their own reusable water bottle and travel mug from home.**

EVALUATIONS

Evaluations are essential to planning future conferences. Distributing the evaluation at registration and/or sending it as a virtual form to all registrants at the end of the conference is recommended.

The planning team should develop an evaluation form that seeks helpful feedback for future planning teams. The evaluation should be comprehensive. Please include feedback on ALL aspects of the conference - if it has a section in this guide- it should be evaluated. (Please see Appendix III for template)

THINGS YOU WILL NEED

This list is not exhaustive, but for your consideration:

- Talk to local Catholic universities, the hosting diocese, or school board for necessary items that can be included in the “take what you need” table.
- This is also an opportunity to connect with CSCO’s partners and other organizations who might make a financial donation to the conference.
- Are the schools of the planning team members willing to cover the cost of printing/photocopying? Is there a school print shop program that might like to take on the printing, or other projects or items, as a project, for a reduced cost?
- Are there creative students who could design the logo/conference theme (for remuneration)?
- Vestments, Liturgical Items. (Some of these may already be at the facility centre if it is a Catholic retreat centre.)
- music stands
- microphones/sound equipment;
- electric keyboard; other musical instruments
- projectors
- screens.
- music and copyright
- stationary supplies (eg. conference booklets, supplies for planning team)
- name tags (various varieties the planning team can choose from);
- cards and gifts for the speakers/workshop presenters (as honoraria);
- decorations and banquet decor
- dinner and glassware

All conference expenses should be covered by the conference fees. Planning teams are encouraged to be judicious in determining whether items needed could be donated, borrowed, rented or purchased. Travel expenses and meals for the planning team when meeting in person throughout the planning process should also be covered by the conference fee. An expense form will need to be filled out for mileage etc. and submitted to the conference planning team treasurer. An example of an expense form can be found on our website or ask your liaison.

TIMELINE FOR PLANNING

WHEN	TO DO WHAT
<p>1.5-2 YEARS PRIOR</p> <p><i>*Will require multiple meetings in this time.</i></p>	<ul style="list-style-type: none"> *Create the Conference Planning Team (includes an Executive liaison). * Attend the initial meeting to read the Conference Planning Guide in detail, led by Executive Liaison. *Select Committee Chair, Treasurer, Secretary etc. * See “Planning Committee Structure” section above. *Set date, time and location for next meeting or subsequent meetings. *Review evaluations from the previous conference, taking note of criticisms, kudos, suggestions, etc. *Review past budget(s). Begin to get an overall sense of the costs: facility with accommodations; speakers; workshop presenters; etc. vs. possible revenue. *Request ‘seed’ money from the Executive and open the bank account. *Select the date for the Conference and the location; book the facility. *Decide who on the team will be the liaison with the conference facility. *Make a list of 2 or 3 possible speakers/facilitators—some may not have those dates available, and make contact with speakers to determine availability. The speaker should be booked as early as possible. *Initial meetings of the planning team may be lengthy ones. Please set aside enough time for these discussions.
<p>1.5 - 1 YEAR PRIOR</p> <p><i>*Will require multiple meetings</i></p>	<ul style="list-style-type: none"> *Determine a price range for your conference, examining your revenues and expenses *Decide how best to represent the theme of the conference by use of a logo, a picture, scripture passage, a song, etc. *Attend the conference held immediately prior to the conference you are planning. Take notes and ask questions. Every effort should be made to have at least 2-3 members of your team attend the previous conference. *Present initial “launch” for your conference, including theme, speaker and location and dates. *Provide a “save the date” flyer to be posted by the CSCO Communications Coordinator on the website to keep CSCO members notified of the date and the theme.
<p>9-12 MONTHS PRIOR</p>	<ul style="list-style-type: none"> * Pricing for the Conference should be finalized and communicated to the members before the end of the previous school year- to allow for budgeting of the cost. *Design the Registration material: include the name of the registrar and their full school address and contact information. Confirmation of registration for the registrant must be provided upon receipt. PROOF READ EVERYTHING...TWICE, THRICE, FOUR TIMES! What you send out reflects the CSCO organization and is done on behalf of CSCO. Check spelling, grammar, tone, punctuation, etc. *Offering an early registration is highly recommended (ie. June/August of previous year and sent out again in September/October). Consider scheduling early registration to coincide with any deposits or payments that may be owing ahead of the conference. *Begin drafting the flow of the Conference and program needs. Begin translating the program into a schedule, keeping in mind that 3 hours is needed for the AGM. *Decide if there will be workshops available and who will be the presenters. Begin contacting these individuals incorporating their strengths with the theme of the conference.
<p>8-9 MONTHS PRIOR</p>	<ul style="list-style-type: none"> *If you have not already done so, open registration and share it with all CSCO Members and on the CSCO Website (The CSCO Communications Coordinator can assist with this). *Decide on which vendors will be invited to display their wares (each vendor is asked to pay a fee for a table). Send invitations to vendors.

6-8 MONTHS PRIOR

*Will there be conference spirit wear ordered or available for people? Determine if there will be special t-shirts ordered for the planning team which will set them apart during the conference so they will be easily recognized by the membership.

*Continue with the conference details: refinement of the schedule, the prayer sessions, the Liturgy, the Banquet, the social times, the conference package, etc.

*Development of the Prayers and Liturgy can be brought to more detail—perhaps in the initial conversation specific scripture passages or themes arose, these can be the focus of the prayer rituals and the Liturgy. Songs can be chosen and consideration must be given to paying for copyright if songs are not in the hymnals at the retreat centre. If prayer booklets will be made, permission to copy and use songs will need to be secured.

*Discuss various jobs to be continued/completed in the fall should the summer break be approaching. Set dates and timelines and assign people to these tasks.

Summer Break

*Not much can happen during the summer months by way of planning. If the planning team wishes to meet, it is up to them to make the arrangements. Normally, communication can be made by way of emails as to the progress of their respective responsibilities.

*One or two planning team members should be designated as contacts in case the speaker/facilitator or workshop presenters needs to get in touch regarding any aspect of the conference.

3-5 MONTHS PRIOR

*Final discussion with workshop presenters as to their needs for their part (projector, screen, etc.).

*Contact the conference facility to finalize details re: schedule, meals, special dietary needs, special events, banquet needs, sound system, etc.

*Work with the CSCO Executive re: the AGM. The CSCO President will take care of the AGM Agenda.

*Give final shape to the program schedule.

*PROOF READ EVERYTHING... TWICE, THRICE, FOUR TIMES! What you send out reflects the CSCO organization and is done on behalf of CSCO. Check spelling, grammar, tone, punctuation, etc.

1-2 MONTHS PRIOR

*Finalize the Prayers and Liturgies. If not already done, determine principal presiders, musicians, etc.

*Prepare liturgy aids (for example slideshows, booklets or handouts. (Don't forget to include the permission/copyright information at the bottom of the page or underneath each song!)

*Stay in touch with the conference facility regarding numbers, etc. Send them a final copy of the schedule and where each element is to be located in the facility. Confirm once again the times of the meals, physical arrangement of the spaces used, special refreshments, etc.

* REMINDER: Treasurer ought to be keeping a detailed record of all revenue and expenses. (Remember, at the AGM in the following year, a report of the CSCO Conference budget is given with the treasurer's report.

*Reminder emails sent out to membership (touching base, fun notes to generate excitement about the conference)

<p>1 MONTH PRIOR</p>	<p>*Review the conference checklist. The team should do what they can to limit any surprises from catching them off-guard. Checklist: ___ Conference packages (are all pieces there? anything still to procure?) ___ Purchases: supplies, name tags, gifts, thank you cards, etc. ___ Rentals needed: sound equipment, etc. ___ Licenses/permits secured ___ Evaluation form: prepare, have link to share or print enough copies. ___ Conference site set up: items for prayer table in main area, liturgy needs, banquet needs, workshop needs, etc. ___ Registration/Welcome table: who? when? how? etc. ___ Confirm on team, who is leading what (MC's, thank yous, registration, liturgies etc)</p>
<p>MONTH OF!</p>	<p>*Plan a final pre-conference planning team meeting in the weeks before the conference. Review the checklist and any final errands/details that need to be taken care of. *The big stuff is planned, focus is now on the details: ___ keep reviewing the checklist; ___ remember the cards/gifts for presenters; ___ keep an up-to-date registration list and accounts; ___ keep ALL receipts and list of expenses; ___ stay in touch with the conference facility, especially where last minute changes are concerned; ___ stay in touch with the CSCO Executive.</p>
<p>PRE-CONFERENCE:</p>	<p>*Plan to be at the conference facility one day prior to official opening/AGM to: ___ work together to complete setup and various conference needs; ___ prepare spaces for prayer, liturgy, main gathering space, welcome/registration area/tables. ___ Test sound equipment, visuals, power points etc.</p>
<p>DURING CONFERENCE:</p>	<p>*Greet people, handle registrations, provide information, take pictures, etc. *There should be one person to be the liaison with the conference facility to make things easier. If other planning team members have requests for the facility, it should go through the liaison, otherwise it is confusing for the facility staff—there shouldn't be too many "cooks in the kitchen!" *The planning team is responsible for running the Conference: planning team members should welcome participants back after each break and take care of administrative details.</p>

POST CONFERENCE

WHAT	DETAILS
EVALUATION	<p>*The planning team should meet in the month following the Conference, while the Conference is still fresh in memory to review the evaluations.</p> <p>*Based on the evaluations and their own experience of the conference, the team is asked to prepare a report of comments and recommendations for the CSCO Executive and the incoming conference planning team.</p> <p>*The evaluations should be sent to the CSCO Executive once they are finished being reviewed.</p>
DINNER	<p>*The planning team is invited to enjoy a dinner out, as a congratulatory celebration. CSCO to take care of the bill.</p>
BANK ACCOUNT	<p>*All conference bills need to be paid, collect all outstanding fees, and finalize records as best as the team can. Submit all banking documents to the CSCO Executive Treasurer.</p> <p>*Close the bank account once all cheques have cleared. Any funds remaining in the account should be directed to the CSCO Executive Treasurer. Also, all documentation should be directed to the CSCO Executive Treasurer: all bank books, cancelled cheques, invoices, receipts, etc.</p>
FINANCIAL REPORT	<p>*Prepare a formal financial report for CSCO once all cheques have cleared and the bank account has been closed. Use the report format suggested by the CSCO Executive Treasurer. This will be shared at the AGM in the following year.</p> <p>*This report should include all details of revenue and expenses and in the rare case of any discrepancies they must be explained.</p> <p>*This information is necessary for the incoming conference planning team and for the CSCO Executive.</p>

Appendix I Conference Treasurer Budget Responsibilities

The conference is meant to be a break even venture. So with that in mind, budgeting should be done as soon as possible. Once you have chosen your keynote(s), the dates and the site of the conference, the preliminary budget should be underway. This is critical to the overall success of your conference.

Your budget will begin with all of your expected expenditures. Itemize all costs even if you are not sure. Some expenses will be per person costs but some will be fixed costs. For example the speaker fees will be a fixed cost. The accommodation cost will be per person cost.

a) ITEMIZE COSTS

List and estimate your expected costs. Here are some to consider:

Fixed

Speaker(s) fees, accommodations, meals, travel, technology

Workshop presenter fees, accommodations, materials, technology

Office supplies

Team Dinner (this is your celebratory dinner after the conference has wrapped up)

Vendors

Atmosphere (banners, prayer table, displays, banquet tables, signage ...)

Gifts/Honorarium for speakers etc.

Team shirts/sweatshirt/jacket/vest

Social evenings (beer and wine are to be “at cost”, supplies for activities ...)

Team travel expenses

Per person

“Take What You Need” items (if provided)

Host Site (accommodation, meals, snacks, refreshments)

Banquet (possible increased meal cost, providing wine)

Other

Add any other costs you can imagine.

b) ESTIMATE NUMBER OF ATTENDEES

Begin with an estimate of the number of attendees. From a financial point of view, it is always better to under-estimate than over-estimate.

c) CALCULATE THE REGISTRATION FEES

Begin by calculating the total fixed costs. Divide this by the number of attendees. The result is the per person fixed cost (**pp.fixed.cost**).

Now calculate the per person costs for each registration option you are offering

(**pp.option1.cost**, **pp.option2.cost**, **pp.option3.cost** ...).

Calculate **option1.fees** = **pp.fixed.cost** + **pp.option1.cost**

Calculate **option2.fees** = **pp.fixed.cost** + **pp.option2.cost**

Calculate **option3.fees** = **pp.fixed.cost** + **pp.option3.cost**

...

Using this cost estimate for each registration option, you now can set your registration fees for each option. The guideline is that the total cost of registration for the complete conference including accommodation should be on par with similar conferences. Since the conference is meant to break even, your registration fees should be close to your costs.

- d) SUBMIT PRELIMINARY BUDGET TO THE CSCO TREASURER**
Once you have sent the preliminary budget to the CSCO treasurer, arrange a time for a team member to meet (probably virtually) with the CSCO treasurer and discuss the budget.
- e) NOTIFY CSCO TREASURER OF ANY CHANGES TO THE BUDGET**
As this is a preliminary budget, there will be changes as your planning progresses. Ensure that you notify the CSCO treasurer each time there are changes.

Appendix II SPECIAL OCCASION PERMITS 101 and Smart Serve info

Special Occasion Permit

"Special Occasion Permits are for the sale and service of beverage alcohol at special occasions such as weddings, charity fundraisers, receptions etc. Special Occasion Permits are issued through Liquor Control Board of Ontario ("LCBO") SOP service stores throughout the province on behalf of the Alcohol and Gaming Commission of Ontario ("AGCO")."

In terms of the law, of most importance is the fact that we hold our conferences in places that can be rented by the public, meaning that our locations are not considered "private places" in terms of the Liquor License Act, and therefore whether we are selling Liquor or just serving it at no cost we need Special Occasion Permit(s).

Anywhere alcohol is going to be served there needs to be a license.

While the province doesn't require Smart Serve for an SOP, the hall/conference center you are using or the municipality you are in might.

An SOP is required if you are planning to sell or serve alcohol at special occasions, such as weddings, charity fundraisers and receptions. An SOP is needed any time alcohol is offered for sale or served anywhere other than in a licensed establishment or a private place (for example, a private office or a residence).

There are three types of special occasions for which a permit may be issued:

- Private Event: For events where only invited guests will attend. These events cannot be advertised and there can be no intent to gain or profit from the sale of alcohol at the event.
- Public Events: For events that are open to the public. Public events can be advertised and allow for fundraising/profit from the sale of alcohol.
- Industry Promotional Events: For events held to promote a manufacturer's product(s) through sampling. There can be no intent to gain or profit from the sale of alcohol at the event.

The Registrar of Alcohol and Gaming may impose one or more AGCO-Board approved conditions on a Special Occasion Permit to mitigate identified risks to public safety or the public interest. See conditions here: http://www.agco.on.ca/pdfs/en/RBP_conditions_SOP.pdf

A monetary penalty may be assessed against a permit holder by the Registrar of Alcohol and Gaming for breaches of the *Liquor Licence Act* and Regulations

Private Places

A "private place" is defined as an indoor place to which the public is not ordinarily invited or permitted and is not available for rent to the public for occasional use. A company's private boardroom is an example of a "private place".

- (Cannot bring in your own alcohol in the licensed area)

Classes of SOPs

There are two classes of Special Occasion Permits available:

1. **Sale:** A Sale SOP is issued when money is collected for the sale of alcohol either directly or indirectly. This could be through, for example, an admission charge to the event, when tickets for alcohol are sold to people attending the event, or when there is any pre-collection of money for the alcohol. The application fee for a Sale Permit is \$75.00, for up to three consecutive days.
2. **No Sale:** A No Sale SOP is issued when alcohol is served without charge or when there is no money collected for alcohol – either directly or indirectly – from guests.

The application fee for a No Sale Permit is \$25.00 per day.

AGCO website: http://www.agco.on.ca/en/services/permit_special_LSL.aspx

Application: http://www.agco.on.ca/forms/en/1575_a.pdf

Responsible Service Tip Sheet: http://www.agco.on.ca/pdfs/en/tip_sheets/3202.pdf

Private Event Guidelines: http://www.agco.on.ca/pdfs/en/9024_sop_private.pdf

Smartserve Guide to Special Occasion Permits: <https://www.smartserve.ca/private-event-permits>

APPENDIX III - Forms

**These simple templates are meant to provide suggestions as to what should be included in your forms. Digital forms should be used where possible.*

Registration Form Template:

[Year] CSCO Conference: [Dates]

[Conference Theme}

Registration

First Name _____ Last Name _____

School _____ Board _____

School Address:

Address Line 1 _____

Address Line 2 _____

City _____ Province _____ Postal Code _____

E-mail _____

Phone Number _____

Conference Information:

Please select the type of registration you would like

- Full Conference Registration Single Accomodation - Member: [\$]
- Full Conference Registration Double Accomodation - Member: [\$]
- Full Conference Registration Single Accomodation - Non Member: [\$]
- Full Conference Registration Single Accomodation - Non Member: [\$]
- Commuter Conference Registration - Member: [\$]
- Commuter Conference Registration - Non Member: [\$]
- Banquet Only: [\$]
- Additional Nights Accomodation: [Cost] Date: _____

Special Dietary Requests (Please list below):

Special Accessibility Needs (Please list below):

Preferred Roomate (Double Accommodation): _____

Method of Payment:

- Board EFT (Individual)
- Board EFT (Group)
- Individual EFT
- Cheque
- Other: _____

Workshop: First Choice
Workshop: Second Choice
Workshop: Third Choice

Please make cheques payable to: [conference]
Send registration forms and payment to:
(Provide Registrars contact information here- two points of contact are recommended)

[School Name]
Attn: [Registrar 1 Name]
[School Address]
[Registrar 1 Phone # and extension]
[Registrar 1 Email Address]

[School Name]
Attn: [Registrar 2 Name]
[School Address]
[Registrar 2 Phone # and extension]
[Registrar 2 Email Address]

Evaluation Form Template

[Year] CSCO Conference: [Conference Theme]
 Conference Evaluation Form

Please rate the following aspect of the conference on a scale of 1-4
 1 = Poor, 2 = Fair, 3 = Good, 4 = Excellent

	1	2	3	4
Conference Promotional Information	•	•	•	•
Comments:				
Registration Process	•	•	•	•
Comments:				
AGM	•	•	•	•
Comments:				
Keynote Speaker	•	•	•	•
Comments:				
Variety of Workshop Topics	•	•	•	•
Comments:				
[Workshop 1]	•	•	•	•
Comments:				
[Workshop 2]	•	•	•	•
Comments:				
[Workshop 3]	•	•	•	•
Comments:				
Prayer Opportunities/Liturgies	•	•	•	•

Comments:				
Conference Mass	•	•	•	•
Comments:				
Conference Facilities Overall	•	•	•	•
Comments:				
Meeting Rooms	•	•	•	•
Comments:				
Vendors/Exhibitors	•	•	•	•
Comments:				
Meals	•	•	•	•
Comments:				
Banquet	•	•	•	•
Comments:				
Awards/Recognition	•	•	•	•
Comments:				
Accommodations	•	•	•	•
Comments:				

What was most valuable? _____

What was least valuable? _____

What was missing? _____

What would you have liked to be done differently? _____

Any other comments? _____

**You may wish to use the checklist found in the “Where to Start” section as a guide to your conference evaluation questions.

Appendix IV: Music and Copyright

The following are some of the major publishers of liturgical music. Planning committees are encouraged to verify with the publishing house what the current requirements are before proceeding to print. This list should not be considered exhaustive.

Copyright Company	Who they cover	Website
LicenSing Online	<p>Oregon Catholic Press (OCP) now covers NALR and New Dawn Music. Copyright and Permission can now be obtained through LicenSing Online.</p> <p>Resources include GLORY AND PRAISE hymnals and artists like Bob Hurd, Dan Schutte, and Michael Joncas.</p> <p>Various options are available.</p>	<p>www.licensingonline.org</p> <p>see also: www.ocp.org</p>
OneLicense.net	<p>Covers GIA songs and artists. Podcasting licenses are now available as well.</p> <p>GIA is commonly known for their GATHER hymnals and artists like David Haas, Marty Haugen, and Tony Alonso, as well as Taize hymns.</p>	www.onelicense.net
CCLI – Christian Copyright Licensing International	<p>CCLI - Christian Copyright Licensing International 7 Day Event license</p> <p>Covers over 3,000 publishers/song owners and over 300,000 songs Includes contemporary musicians such as Matt Maher, Chris Tomlin, Jesse Reeves, and Paul Baloche</p>	ca.ccli.com