



Agenda Item: C-4 (as amended)

TO: APA California Chapter Board

FROM: Kim Prillhart, AICP
CHC Co-Chair 2011 & Past Section Director, Central Coast Section

DATE: January 29, 2012

SUBJECT: Summary for 2011 State APA Conference in Santa Barbara

RECOMMENDED ACTION:

It is recommended that the APA California Board **REVIEW** the amended Summary Report, prepared by the Conference Host Committee (CHC) for the 2011 State APA Conference hosted by the Central Coast Section in Santa Barbara.

It is also recommended that your Board **DIRECT** the Standing Conference Committee (SCC) to meet and report back to the Board within two months on a plan to implement a conference improvement strategy (i.e., implement or dismiss, in writing, proposed improvements and recommendations as outlined in this report) to ensure a smoother transition of the State Conference from year to year.

BACKGROUND:

The 2011 APA California Conference was hosted by the Central Coast Section, September 11-14, 2011 at Fess Parkers Doubletree Resort in Santa Barbara. This report should be used by the APA California Board to ensure that the particular successes of a conference are continued from year to year and that the issues that require improvements receive appropriate and immediate action. As the State Conference changes from one committee to the next each year, it is critical that a plan is in place that clearly implements changes to ensure the transition is as efficient and seamless as possible.

Also, in order to provide the Board with a broader perspective, it is recommended that the Conference Closure Report to the Board be prepared annually with the input of the CHC as well as the consultants, in addition to the VP of Conferences.

SUCSESSES:

1. Over \$110,000 in profit. Had Caltrans not pulled their \$25,000 commitment, it would have been one of the top financially successful conferences in the past 10 years.
2. A 95% approval rating of the Overall Quality of the Sessions from the 115 AICP Evaluation Forms Received.
3. A very successful and well received Opening Event at the Santa Barbara Zoo, the cost of which came in both less than the Fess Parker hotel could provide and under our approved budget. Overall, the Opening Event expenses were close to \$9,000 less than the budget the CHC was originally given for the event.
4. Over 700 hours of volunteer time by a small, energetic group over a 16 month period.
5. Two dynamic government Keynote Speakers were booked at a cost savings of over \$8,900 because no additional speaker fees were required.
6. An innovative smart phone app and a smaller Conference Program were produced – both for less than the budget given to the CHC to produce the program only.
7. Improved response to the Sustainability Survey 291 up from 53 in 2010 (due in large part to the mobile app).
8. Carbon Footprint Offsets – 80% of respondents to the survey believe that a carbon offset purchase should be available for the 2012 Conference
9. E-Ride Share – Although the e-Rideshare program was not used, 90% of respondents say that they would like it to be available for the 2012 Conference. Also, 40% of respondents said they carpoled to the conference.
10. The elimination of the third day brunch saved the conference an estimated \$20,000, and was a decision and vote made by the CHC. A Dining Guide for local area restaurants was developed by the CHC for conference attendees to experience Santa Barbara before they headed home.
11. In addition to the mobile app, the use of Twitter added an additional level of participation from conference attendees. In total there were 375 tweets about the conference from 55 different people, including those that couldn't attend the conference but felt included to know what was going on. This was very popular – especially at the Keynote lunch where the comments were live and on the screen.
12. No plastic water bottles were used during the conference.

ISSUES REQUIRING IMPROVEMENT AND FOLLOW UP:

1. More detailed analysis of the initial Conference Budget provided to the CHC. Requires follow up with SCC.

2. Suggestions were provided by the CHC for ensuring a smooth collection of the presentations after the conference. **Requires follow up with SCC.**
3. CHC attempted to get the Bar Code Scanning for easier CM reporting (as National does) but our consultants informed us after checking with National that it could not be done. **Requires follow up with National APA.**
4. The current system for On-line submittal of presentations (sessions) was cumbersome, expensive (mailings) and highly inefficient. It may work for reporting to National but some simple technology fixes (such as on-line drop boxes) could be easily implemented to do away with the paper and provide a method for sorting submittals in a meaningful way. **Requires follow up with SCC.**
5. The Sustainability Survey results indicate that the primary reason people did not contribute to the Carbon Footprint Offset was because their registration was paid for by their employer, (51%). Survey results also indicate that 30% of respondents did not participate because they were not sure how the \$\$ collected would be used. These are two potential areas where the process can be improved. **Requires follow up with SCC.**
6. E-Ride Share Program. **Requires follow up with the SCC to build upon this program from year to year.**
7. Volunteer coordination at the 2011 Conference could have been smoother. One of the issues was communication. The registration volunteers refused to give conference bags to one-day participants for much of the conference (which irritated many attendees) and then an entire box of conference bags was leftover unused at the end. There was also a lack of volunteers in the sessions to assist with AV needs/complications for speakers. **Requires follow up with SCC.**
8. Our Conference Host Committee would have benefited greatly from assigning one person the task of PR. This was a missing link.
9. All expenses outside of the approved budget should be approved by the Board or the Chapter President. **Requires follow up with SCC.**
10. Improve the look and spacing (very small) that the Conference receives on the State APA website...there is a lot of room on the home page that could be utilized for a more substantive presence and advertising of the conference. **Requires follow up with SCC.**
11. All correspondence sent out to the general membership regarding the conference should be reviewed and approved by the CHC Chair(s) with a 24-hour turnaround policy. **Requires follow up with SCC.**
12. Some of the Sustainability activities that the CHC wanted to implement, (e.g., improved on-site recycling opportunities) required closer coordination with Fess Parker staff. But for the months leading up to conference, we were informed through our consultant, Lynne Bynder, not contact the Fess Parker staff directly. This protocol made it very difficult to understand what direction our consultant was providing to the Fess Parker and how closely that direction was aligned w/ the interests of the CHC. This was also true when the CHC was attempting to obtain simple information from the hotel about possible costs from for the Opening Event (heat lamps, corkage fees, etc.). **Requires follow up with SCC.**

13. Improvement to the Media Coverage as outlined in the Conference Manual. Requires follow up with SCC.

HIGHLIGHTS:

Opening Reception

At least 77% of the full-conference attendees attended the opening reception. Feedback on the opening reception was widely positive. Results indicate that full-conference attendees are more likely to attend the opening reception.

Original State Budget as of August 2010:	\$61,500.00
State Approved Budget as of 11/02/2012:	\$53,829.18
Final Expenditures for Opening Reception:	<u>\$52,618.63</u>
<u>under Budget by:</u>	<u>(\$ 1,210.55)</u>

Conference Events Chair, Hollee King, diligently worked with the caterers, the wine vendors and trolley companies in the area, and the Santa Barbara Zoo in order to secure the best pricing, discounts, menu options, etc. to ensure the event was successful and within budget. Not only was the opening reception well attended, respondents commented positively on the zoo/outdoor venue, the entertainment, the delicious food, the chance to meet and greet and catch up with colleagues in a setting other than the hotel, where they will be housed for the duration of the conference. The committee also honored the 10th anniversary of 9/11 by having a moment of silence before dinner.

Specific Discounts Applied to the Event:

Caterer – 15%, plus better menu choices and additional appetizers
 Event rentals (tables/chairs, lanterns, etc.) – About a 20% upgrade on rental supplies
 SB Winery – 50% off wine
 Zoo – 10% - 15% discount
 DJ – 50% off
 Trolley – 10%

Programs Committee

One of the innovations the Programs Committee, led by Tricia Maier and Eva Turenchalk, integrated in 2011 was to combine 2-3 sessions on similar topics together, so that more interesting sessions with the best speakers were created and redundancy was eliminated. This involved much work in reviewing proposals for opportunities to combine, coordinating with moderators, creating new session titles, etc. This greatly benefitted the 2011 conference.

Sponsorships

Jay Higgins and his team did an outstanding job in getting sponsorships and meeting their goals. This was done in part by Jay and the CHC insisting on achievable income goals from the outset and then reaching to surpass those goals. The original budget provided to the CHC for sponsorship was \$152,000 (draft budget dated 8/11/10 minus the \$20,000 Caltrans/Line 215) and

the adopted budget was \$62,550 (also minus Caltrans. The CHC cut many other areas from the original budget that was provided to the CHC (such as cutting over \$10,000 from the \$24,000 for AV Equipment/Line Item 1803, \$24,000 for the Wednesday lunch/Line Item 1702 and added coffee/juice in place for \$6,000). To Jay's credit, he was on top of sponsorships from day one and continued raising money until the days and weeks before the conference which led to the close to \$20,000 over budget in this income category.

Student Day

Leeanne Singleton and Paul Wack really hit Student Day out of the park! The much higher than budgeted participation of students and young planners was a great success. As indicated in the financial report, these two categories exceeded budget expectations by over 150% each, which should highlight the importance of including students and young professionals in the conference and ensuring there are sessions that address issues that interest these young planners.

The 2012 Conference had close to 100 students participate in the free student day and 10 additional groups of students who presented their projects and course work to other students and attendees. This was successful due to both the central location of the conference and the timing of the conference before many schools had started the semester. The next conference will be held in October, which may decrease student participation in the conference for both the free day and the paid days.

Sustainability

The Sustainability Committee, led by Shelley Sussman, worked to reduce the "ecological footprint" of the event in many ways and introduced several Sustainability programs for the first time, including the ability to purchase a "Conference Transportation Carbon Offset," development of a Conference-specific link to eRideshare.com to facilitate carpooling, a reconfigured Conference Program, and coordination with the Fess Parker to procure food from local vendors. The Sustainability survey responses indicate that respondents support many of these activities: 80 percent want the option to purchase a carbon offset in 2012; 90 percent would like eRideshare to be available next year; and 96 percent were satisfied with the reconfigured conference program.

OVERALL SUGGESTIONS:

1. Review/implement issues that require improvement as outlined above.
2. Review/correct the method(s) that the Conference Program is currently published.
3. Set realistic conference budget and expectations, in consultation with the CHC, reflective of the economic conditions as well as the location of the conference.
4. Assign a drop-dead deadline for all revisions to session information weeks before program/mobile app production. The only exceptions are last minute changes to speakers (added to the mobile app only) and canceled sessions (for program addendum and mobile app).
5. One person (and an assistant for back-up) should be the contact for collecting and tracking all of the session information. He/she should use an interactive document editing program like Google Docs to make edits so that they can track the history of the

document (when was the last update to the document and by whom) and have a central location to always access the most up-to-date session information. With an interactive document editing program, you can define user security rights so that only the appropriate individuals can edit the document while others can only read the document.

6. For future conference, CHC should inquire about expanding the mobile application so that it is accessible for all mobile devices and smartphones. Additionally, the CHC should also raise more awareness about the mobile application before the conference and utilize it for PR purposes in order to garner more sponsorship opportunities. Finally, the CHC should only disseminate printed programs for conference attendees who request them.
7. The Conference Closure Report to the APA Board should be prepared with the input of the CHC as well as the consultants in addition to the VP of Conferences.

CLARIFICATIONS TO THE DECEMBER 19, 2011 REPORT PREVIOUSLY PROVIDED TO YOUR BOARD:

See following 12/19/11 Report with CHC comments in Red

The CHC would like to close in saying that even with the economic challenges, a great conference was produced with overwhelming positive feedback and several new innovations that produced a profit of over \$110,000. Something we can all be proud of – thanks to everyone who participated.



ADDED COMMENTS/QUESTIONS FROM THE CHC DATED 1/29/12 IN RED

Agenda Item: C-4

TO: APA California Chapter Board

**FROM: Janna Minsk, AICP
VP for Conferences**

DATE: December 19, 2011

SUBJECT: Summary for 2011 Conference (Santa Barbara)

Recommended Action:

It is recommended that the APA California Board receive the summary for the 2011 Conference hosted by the Central Coast Section in Santa Barbara.

Background:

The 2011 APA California Conference was hosted by the Central Coast Section, September 11-14, 2011 at Fess Parkers Doubletree Resort (Santa Barbara, CA). Despite tough economic times, the Central Coast section working closely with the State resulted in the 2011 APA Conference netting a \$107,991 profit!

This was the second year sessions and workshops received pre-approved continuing maintenance credit to assist members with meeting the AICP continuing maintenance requirements. Additionally, this was the second year the submittal of "Request for Presentations" was completed on-line.

Several Conference innovations were introduced by the 2011 CHC such as the mobile App and smaller dimensioned print program both of which were generally well received as indicated by conference survey respondents.

Summary:

As with any event of this size, we received compliments and criticisms. The compliments included: enjoyed the location and venue, Panama Bartholomy was excellent, input on sessions was generally positive. Areas for refinement/improvement: attendees felt that there were too many sessions pertaining to climate action plans/GHG, and LEED/green building related. Attendees found some sessions to be too introductory, lacking advanced subject matter, moderators or session panelists appearing in too many sessions and the rehashing of several sessions from the 2010 Conference with the same session panelists.

CHC RESPONSE: The Programs Committee (with input from State reviewers) did limit the number of sessions an individual could participate in during the 2011 conference. For this reason, Jennifer Lilly was unable to present all of her sessions, though they were all top notch proposals. In general, the 2011 Programs Committee felt that it was the content/substance of the sessions and the ability of the speakers that was most critical during the selection process. The State reviewers felt differently and wanted to limit participation where the same person was facilitating multiple sessions. In the end, we deferred to the State reviewers' input and limited session participation.

The reality is that when the CHC selects sessions, we're dependent on an anonymous group of planning professionals to submit cutting-edge, interesting and new topics with dynamic speakers. The Program Committee members did spend extra time brainstorming topics and approaching potential speakers to submit session proposals to ensure that a good mix of topical areas was included in the overall program offering. The CHC has no control over whether there are dozens of resubmittals from the previous year, whether sessions submitted are primarily for entry level planners, or whether 40% of the sessions submitted are on the topic of greenhouse gases/climate action plans (as occurred this last time). We can only do the best we can with what we have to choose from.

Attendees also, commented regarding the fact that the several CHC members included themselves on multiple sessions.

CHC RESPONSE: Only one survey could be found with this comment. Nevertheless, with 425 speakers, the CHC had six of those spots and two out of those six were ones that are always done by the speaker – CHC or not. Paul Wack, the Co-chair for the Student Day & Kim Prillhart, the Co-Chair for the Ethics session that is always done by the Section Directors. That is just over 1%, which does not appear to be excessive.

On-line Submittal of Presentations (Sessions): While they were some glitches with the on-line submittals, overall, this system has made the selection of sessions and providing the required information to National APA for continuing maintenance easier.

CHC RESPONSE: This issue of on-line presentation submittal is an area that needs immediate attention. The current system is using completely outdated technology (even if it is relatively new). There's no reason not to be using dropbox (or similar free service) for

one shared version of conference sessions that everyone can access and edit as needed without duplicating efforts. Or creating an interactive database for sorting of the submitted session proposals in a meaningful way. The existing system is woefully inadequate for the task. It requires cutting and pasting each individual session proposal into a pdf, then paying hundreds of dollars to print the individual pdfs (with no organization or sorting).

A suggestion for future on line submittal forms is to include the session leader's phone number (in 2011 there were too many occasions in which the Programs Committee sent emails to session moderators with important conference information that required responses which went unanswered by the session leaders).

CHC RESPONSES: The problem wasn't that the moderators didn't receive them. The problem was actually that the moderators did not forward them to their session participants. This is an entirely different issue. It doesn't seem likely or feasible that Programs Chairs would have time to make personal phone calls to moderators to verify they are forwarding emails appropriately to their session participants. With the volume of sessions and the sheer number of presenters, we would recommend getting the email addresses of individual participants rather than only the moderator to address this problem. That way all participants would have received relevant email reminders such as registration deadlines, etc.

Conference Registration Summary: Taken from Registration Forms & Profit & Loss Statement

Registration Category	Registrants per Category
Full and Single day Members	548
Full and Single day non-members	83
Young Planners	54
Students	44
Speakers	138
Central Coast raffle winners	20
Full Comps	4
Half Day rate	1
Total	905

The actual number of paid registrations totals 905. Beginning in 2010, conference speakers were required to pay to attend the conference. All speakers, APA members or non-members were provided a reduced registration (full or one day).

Unfortunately, our registration projections fell short in certain registration categories and exceeded expectations in others. Based upon the last few conferences, we projected greater revenue than received from our members during the early registration time frame (projected 450 registrants vs 359 actual), reality is the 2011 conference realized only 79% of the project revenue in that category. This may have resulted from a combination of permitting APA members who are speakers to register at the discounted rate of \$360 rather than the full conference rate of \$ 450

coupled with simply lower overall registration due to the economy. However, this alone resulted in a loss of projected revenue of \$40,950. Several registration categories did exceed our projections however, when all totaled, actual registration revenues were down by \$26,750.

As the registration deadlines past with registration numbers lower than projected, Lynne, the hotel and I decided to decrease the total number of meals served to better match the registration and conference attendee numbers. We also pared down the variety of items served for breakfasts on day 2 and 3; this resulted in over a \$30,000 savings to the conference.

CHC RESPONSES: It is noted in the Actions Minutes from the State Board meeting that “The conference policies will be amended to state that full breakfasts are a lower priority, and continental breakfasts are fine if they are a better value”. It should be noted that when we discussed the Opening “plated” breakfast with our consultant Lynne Bynder, she let the CHC know that cost would be the same. The CHC feels (as do many making comments about the decline of the breakfasts) that if you serve a lower quality/quality of food you should charge less to the membership. Also, the discussion on the difference in hot breakfast vs. centennial breakfasts should be a negotiating point with the hotel – more so than the free rooms or suites. We also note the cost savings from the hotel on the food due to the over estimation of attendance.

Due to State budgetary concerns, Caltrans pulled out; however, working together, the State and 2011 CHC were able to plug financial loss of Caltrans through seeking additional sponsorships, exhibitors and reducing food/hotel costs. Due the efforts of Jay Higgins, Sponsorship revenue exceeded budget projections by \$19,350.

Sustainability Efforts: Conferences continue to implement sustainability guidelines adopted by the State however the extent to which conference sites have sustainability practices varies with each Conference venue. The 2011 CHC worked closely with Fess Parker’s to fulfill sustainability ideas by serving locally grown food (when possible), eliminate plastic water bottles, minimizing waste.

Carbon Footprint-This year registrants were provided an opportunity to make a carbon foot print donation.

Carbon foot print donation

Contribution Amount	Number	\$\$\$
\$10	5	\$160
\$2	134	\$268
\$5	32	\$160
Total	271	\$588

Conference attendees were interested making a carbon foot print donation, unfortunately, the process, purpose and organization receiving the donation was not made clear.

Sustainable Survey Results:

This year 225 (**should be 291**) conference attendees responded to the on-line survey, the complete survey results are attached. Briefly, below are items of interest:

CHC RESPONSE: It's worth noting the success we had in getting responses to the Sustainability Survey. We made it available on the Mobile App, the APA web page, and we sent e-blasts out to remind people to fill out the survey. As a result, we got 291 responses. This compares to 53 responses to the Sustainability survey in 2010 and even fewer in 2009.

- Carbon footprint offset-good idea, however, many did not contribute since it was not clear how the monies would be used, nor were there several options for payment-since over half responding indicated that their employer paid for registration. Suggest- carbon footprint offset be better explained on webpage and registration and Cal Planner article. Also, train registration volunteers at conference to ask and accept payments for carbon footprint offset on site.

CHC RESPONSE: The CHC decided it was most efficient to provide the opportunity to purchase a voluntary carbon offset as part of the on-line registration process. We also noted in the conference program that offsets could be purchased on site. I confirmed with Lynne Bynder that she had directed the volunteers who were processing on-site registrants to ask whether the person was interested in making a voluntary contribution for this program.

Also the Carbon Offset Program was described on the registration page, in the Summer 2011 Cal Planner, in the Conference program, on the Mobile App, and in various e-blasts that went out prior to the Conference.

And finally, the following explanation was provided on the registration page of the APA Conference website and in other conference materials: *"All the money contributed will be used to purchase carbon offsets from TerraPass, a company headquartered in California. All of their projects are located in North America and comply with standards established by the Verified Carbon Standard and the Climate Action Reserve."*

- E rideshare bulletin board-not heavily used by those carpooling, reason for this is most individuals who carpooled, arranged "car pools" on their own. Not one match was provided by the E rideshare board.

CHC RESPONSE: Although the E-Rideshare program was not used, 90% of respondents said that would like it to be available for the 2012 Conference. Also, 40% of respondents said they carpooled to the conference.

- Conference Bag-mixed feelings, however, consideration should be given to phasing out the conference bags as part of our conference sustainability practices.

CHC RESPONSE: There is no mention of the efforts the CHC took to procure a conference bag that we believed would be better received (and reused) by conference

participants. That being said, we honored the desires of our sponsor and produced a business bag that they desired. It was not well received from the comments in the survey and the continued use of the bag should be reviewed and a new sponsorship opportunity should be discussed.

- **Print Program-smaller dimensioned print program. Mixed opinions, while it was easier to carry around, the font size was too small. The highlighting of the law and ethics sessions was favorable. Limit high glossy photos. Suggestion-use a slightly larger dimensioned document to allow for larger font size. Continue to provide blank-lined pages for notes, and continue to highlight the law and ethics sessions for easy reference.**

CHC RESPONSE: Any characterization that there were “mixed opinions” about the conference program is misleading, as over 96% of survey respondents said that the smaller format still met their needs. Out of 62 comments, only three individuals stated that the new conference program needed larger font. However, all three comments did not mention increasing the size of the program to accommodate to a larger font size.

Some comments (16) mentioned that they either did not request a conference program or did not need it because they relied on the mobile application instead.

Out of the 48 comments about the smaller program, also only one person mentioned that the “glossy photos” were not necessary. The CHC does not feel like it is necessary to bring comments forward from one person out of several hundred surveyed in both the CM survey as well as the Sustainability Survey.

- **Mobile App- well received by those who have technology to use it. However, survey comments were split on the mobile app-it’s a great technology, not all conference attendees have smart phones and close to half of the respondents noted how frustrating and rude it was for mobile app followers to use their devices during sessions. Also, noted was hope that mobile app does not replace the print program. Suggestion-continue the mobile app in 2012 depending on costs.**

CHC Comments: Over 73% of respondents said the Mobile App was helpful. Also, this question received the most written comments, (78), many of which stated their enthusiastic support for the App. (The questions about the conference bag and smaller program each received about 50 written comments.) Although some of the survey respondents expressed that they did not own a smartphone, the content in the mobile application duplicated the information in the conference program. Attendees without smartphones were provided with an alternative option.

It is not appropriate to assume that the availability of the Mobile App was the reason that people were accessing their devices during sessions. It’s more likely that people w/ Smart phones would access them even if there was no conference Mobile App available.

With the smaller program size, the CHC spent only half the allocated funds to produce this year’s conference program. The remaining funds for the conference program were used to develop the mobile application, which was introduced for the first time at this year’s

conference. Although the size of the program was reduced, the content remained the same as previous years and was not compromised to accommodate to the new program size.

Fiscal Impact: Included herein is the accounting for the 2011 Conference.

As with the last few years, the state conference has suffered from the overall poor national, state and local economy. This year has been no different and the economy had a profound impact upon the conference. Overall, registration was down close to 15% from our projections, **(how are the projections reached?)** with an increase in over our projections of APA members/speakers taking advantage of the discounted registration rate.

A big thanks to our contractors for making the conference process run as smoothly as possible.

Overall Suggestions:

CHC RESPONSE: These suggestions should be reviewed with the input of the 2011/2012 CHC as well as the SCC.

- Decide number of medias or platforms should be undertaken for publishing the Conference Program.
- Set realistic conference budget and expectations, reflective of the economic conditions at hand.
- Establish a limit on number of sessions a person and CHC can participate in. **(seems unnecessary given the comments above that addresses this issue)**
- Opening reception should be re thought during these difficult economic times (eliminate it or make it optional, on-site and small additional cost to attend). **What is this based upon? At least 77% of the full-conference attendees attended the opening reception. Feedback on the opening reception was widely positive. Results indicate that full-conference attendees attend the opening reception. Feedback was positive for the opening reception in regards to the “meet and greet” aspect of the opening reception. The Opening Reception should be held offsite if it can be done for the same or less cost (as was done with the 2011 Opening Reception) to showcase the local community. If it’s simply going to be a wine and cheese reception at the hotel ballroom, the cost of the full conference registration should be reduced.**
- Continue use of mobile app and either budget for it via sponsorship opportunity
- Update Conference Manual per suggestions - **This must be done with the SCC.**

Attachments:

Profit and Loss-CCAPA 2011 Conference

Balance Sheet- CCAPA 2011 Conference

2011 Conference Sustainability /CM Evaluation Form Summary