

# **UNITARIAN UNIVERSALIST WOMEN'S CONNECTION RETREAT GUIDELINES**

The primary goal of each retreat is to provide an opportunity for women within the region to participate in an enjoyable, fulfilling program experience and have the chance to refresh, restore and refocus. A secondary goal is for the UU Women's Connection to break even financially. The UU Women's Connection provides financial support for its retreats by advancing deposits and/or supplying seed money. The UU Women's Connection Council will oversee the planning and execution of each retreat.

These general guidelines apply to all UU Women's Connection sponsored retreats and should be followed whenever possible. Exceptions, when needed, must be approved by the UU Women's Connection Council. The appendices contain the history of the retreats, detailed policies, specific information about retreat facilities, planning timelines, and examples of forms and packet materials.

At the end of each event, the registrar or treasurer is expected to submit a financial report. A designated councilwoman will tally evaluation forms and pass the results on to the council. These post-event activities are to be completed as soon as possible but no later than sixty (60) days from the end of retreat.

## **I. GENERAL GUIDELINES**

Planning and holding multiple retreats per year requires many volunteer hours. The UU Women's Connection Council should make sure that the responsibility for planning and holding these retreats is divided among the Council members and that additional volunteers are recruited to help when needed. These guidelines outline the specific tasks, subcommittees and key individuals required to put on a successful retreat. A sample planning timeline, examples of required documents, templates for forms, and examples of web based documents are included as appendices.

### **SCHEDULING**

The date of each retreat is selected no later than the current year's retreat, taking into account the retreat site's policies on giving date preference to its regular clients. The weekend is confirmed with the retreat center at the end of the current retreat. The deposit is paid and housing and workshop rooms are tentatively set.

### **THEMES AND ELEMENTS**

Each major retreat is assigned a theme and an element. These set the tone and create a framework for the ritual, keynote and workshops.

The current schedule of themes and elements is included in the Appendix 2. The rotation starts with east and air, and includes south and fire, west and water, north and earth, spirit, above and below, and within, in that order.

### **RITUAL**

The UU Women's Connection Council will appoint a committee to prepare rituals for each retreat that are consistent with the direction and theme. For larger retreats this committee may include and will work with the Keynote, if the Keynote wishes to do or participate in the ritual(s).

### **KEYNOTE**

Keynote speakers will be hired for major retreats. Keynotes should be prominent members of their field with experience speaking in front of groups and leading workshops. The keynote should be identified early. If possible, the keynote for the following year should be announced at the current retreat. Keynote contracts should be signed as early as possible both to make sure the keynote is fully committed to the retreat and to maximize opportunities for joint advertising of the retreat.

The UU Women's Connection Council may appoint a committee to identify and suggest keynote speakers for major retreats. When possible, the subject of the keynote presentation will be consistent with the theme and element assigned to the retreat. Recognizing that not all who attend UU Women's Connection retreats share the same interests, variety will be sought in the topics covered by the keynote speakers. Keynotes will be expected to make a presentation to everyone attending the retreat on Saturday morning and provide a workshop on Saturday afternoon. They may participate in and/or lead other activities and will be allowed to vend during the weekend free of charge.

Prospective keynotes will be contacted by a designated representative of the UU Women's Connection Council who will inquire about their interest and availability. Interested and available prospective keynotes will be asked to provide a proposal which should include information about their keynote presentation, a brief description of their proposed workshop, a list of required materials for the keynote presentation and/or workshop, their speaking fee, estimated travel costs, and any special requirements. This information will be evaluated by the committee and presented to the UU Women's Connection Council who will make the final decision on keynote selection.

Once the keynote is selected, one member of the UU Women's Connection Council will be identified as the point of contact for the keynote (see Keynote Liaison next section). An alternate will also be named. This individual will be responsible for remaining in contact with the keynote, ensuring that the keynote registers for the retreat and completes any required vendor applications, finalizing the contract between the keynote and the UU Women's Connection, and coordinating retreat advertising with the keynote.

Keynote compensation may be negotiated with the final compensation package approved by the UU Women's Connection Council. Compensation may include retreat registration fees, room and board at the retreat, speaking fees, compensation for supplies and materials, and a transportation allowance. The UU Women's Connection Council will make an effort to be consistent in the application of compensation and to respect professionals by paying them fairly for their work. The transportation allowance will be calculated based on the guidelines in Appendix 3 and approved by the UU Women's Connection Council.

## **WORKSHOPS**

The UU Women's Connection Council will discuss workshop topics and presenters during the retreat planning meeting. Individuals may be contacted about leading specific workshops or a general call for workshops may be put out using social media. The call will include instructions for submitting workshop proposals, a point of contact for questions, and a deadline for submissions. Workshops will be selected by consensus of the Council or the process defined in the call.

Once workshops are selected, each workshop leader will be asked to provide a brief description of their workshop, a picture, and biographical information that can be used in the registration and promotional materials. The workshop presenter will be asked to provide information regarding space requirements, materials, group size limits, and other needs or limitations that they may have including any fees or required preparation.

Workshop presenters will receive free registration for the retreat at which their workshop is offered. If a workshop has multiple presenters, only one free registration will be provided. This may be assigned to a single presenter or divided among multiple presenters by making special arrangements with the Registrar before registering for the Retreat.

Workshop presenters may charge participants reasonable amounts for materials. Information about materials fees should be provided to the UU Women's Connection to use in promotional materials and brochures. The workshop presenter will be responsible for collecting these fees themselves.

Although individuals may present workshops on subjects related to their profession or business, workshops are not intended to be marketing or vending opportunities. Workshop presenters are welcome to be vendors at the retreat they present at and may sell goods and services in the vendor area.

## **VENDORS**

Vendors who offer artwork, goods and services are a key part of the UU Women's Connection retreats. At major retreats, the Keynote may have a vending area of reasonable size for free. The UU Women in Religion Store will also be provided with a vending area of reasonable size for free at all UU Women's Connection retreats. Both the Keynote and the UU Women in Religion Store must fill out a Vendor Application through the UU Women's Connection website.

All others who are interested in vending at a UU Women's Connection retreat must complete a Vendor Application through the UU Women's Connection website before the deadline established by the UU Women's Connection Council. Applications will be evaluated and approved vendors will be contacted to confirm space requirements and to obtain promotional information to use in advertising. Vendors will be encouraged to advertise the retreat to others. Vendors will be asked to give a percentage of their total sales at the end of the event to the UU Women's Connection—10% is recommended. Payments by cash or check shall be made to the Treasurer or other Council member in the Treasurer's absence.

## **FUNDRAISERS**

The UU Women's Connection Council will select a committee to prepare and operate fundraisers such as a used book sale, raffle, silent auction, and/or plant sale at each retreat. The committee will provide information regarding the fundraiser to be included in promotional materials and/or the confirmation letter as needed. Committee members will be responsible for setting up and managing the fundraiser(s) at the retreat, and for getting rid of leftover items at the end of the retreat. The committee can establish limits on the number of items that each person can donate or request that those who bring items that are not sold or claimed by others, take them back. All funds collected for fundraisers will be turned over to the Treasurer or her stand-in at the close of the retreat.

## **II. ROLES AND RESPONSIBILITIES**

Key roles that must be filled in order to have a successful retreat are identified in this section. The UU Women's Connection Council is responsible for making sure that all of these roles are filled. For a smaller retreat, one person may be able to fill multiple roles but for larger retreats, that may be impractical. If needed the UU Women's Connection Council may utilize additional volunteers or paid support to fulfil some of these roles.

## **REGISTRAR**

The UU Women's Connection Council will appoint a Registrar for each retreat. This can be one individual or a committee. The Registrar will be responsible for finalizing the registration form, coordinating with the UU Women's Connection Webweaver to set up on-line registration, receiving registrations submitted online, in person, or by mail, making room assignments, sending confirmation information (see appendix), and compiling check-in information. The Registrar will work with the treasurer to keep accurate financial records so that the required report can be completed and finances finalized within sixty (60) days of the event.

### **FACILITY LIAISON**

The Facility Liaison works with the retreat site management and staff to make sure that all of the UU Women's Connection's needs are communicated to the retreat site. This individual will be responsible for assigning spaces for the vendors, workshops, fundraisers, the UU Women's Connection Lending Library, and any additional activities planned for the retreat. The assignments will be made based on information collected from individual vendors, the Keynote, the Ritual/Worship Committee, the workshop presenters, and the Fundraiser Committee. This individual will also assist workshop presenters with any special needs and/or equipment.

The Facility Liaison should obtain booking policies and pricing sheets for lodging, meals, snacks, miscellaneous supplies and equipment needs, and other facility charges from the facility staff or website. Since rates are subject to change, facility rates should be reviewed yearly against fees charged to participants. The Facility Liaison will work with the Council to develop participant fees based on the accommodations, number of meals, and any other usage or miscellaneous fees charged to the Council by the facility. The Council should be informed of changes to facilities' fees resulting in the need to change participant fees. The Facility Liaison will work with the Registrar to make sure that participant fees are accurately reflected in registration materials.

The Facility Liaison is expected to arrive first to the retreat facility to begin setup and be the last to leave, making sure that all participants and vendors are packed and have left and that the facility is in the same condition as when she arrived.

### **KEYNOTE LIAISON**

One individual member of the UU Women's Connection Council will be identified as the point of contact for the Keynote. An alternate will also be named. This individual will be responsible for remaining in contact with the keynote, finalizing the contract between the Keynote and the UU Women's Connection, ensuring that the Keynote registers for the retreat and completes a vendor application, and coordinating retreat advertising with the Keynote. This individual will be the primary point of contact for answering questions that the Keynote may have regarding transportation and retreat site arrangements and will also make sure that required information from the Keynote, like dietary preferences, is collected.

### **PUBLICITY COORDINATOR**

The UU Women's Connection Council will identify a Publicity Coordinator for each retreat. This individual will be responsible for collecting pictures and descriptions from the Keynote, workshop leaders, vendors, and Fundraising Committee to use in advertising the retreat. The Publicity Coordinator will work with the Webweaver, and the owner of the UU Women's Connection Facebook page to coordinate posts about the retreat during the registration period and in the weeks leading up to the retreat in order to generate interest in the retreat. The Publicity Coordinator will also provide vendors, workshop presenters, and the Keynote with information about the UU Women's Connection and the retreat that can be added to their websites or shared on social media. Members of the UU Women's Connection will be encouraged to share this information with Unitarian Universalist congregations and groups that may include interested women.

## **VENDOR COORDINATOR**

The UU Women's Connection Council will identify a point person for vendors. This individual will be responsible for soliciting vendors, receiving vendor applications, and making sure their needs are met at the retreat.

## **WEBWEAVER**

The UU Women's Connection Webweaver will post information from the Publicity Coordinator on the website, establish on-line registration, set up other forms, as needed, and update information on the website when requested.

## **TREASURER**

The Treasurer completes a financial report to account for all moneys advanced and collected within sixty (60) days of the end of the retreat. A sample report is in the appendix. Membership dues and scholarship donations collected are not a part of the profit, but are listed in the financial recap. The UU Women's Connection Treasurer will write checks for required deposits, planning, and materials. The Treasurer also handles scholarship requests, discount codes, and disbursements. The Treasurer is responsible for depositing all funds collected whether by cash, check, or electronic payment to the UU Women's Connection bank account.

## **III. REGISTRATION**

### **REGISTRATION**

Advance registration is required to participate in UU Women's Connection retreats. Adults, who are 18 years of age or older at the time of the retreat, may register on-line or by mail during the registration period. Partial payment may be required at the time of registration. Membership in the UU Women's Connection is not required for participation in UU Women's Connection retreats or other activities, however discounts and early registration may be offered to members. Where possible, registration alternatives such as Saturday only, or single night stays will be offered to make attendance easier. Late registrations will be considered at the discretion of the registrar. Consistent with the Bylaws of the UU Women's Connection, any individual may become a member of the UU Women's Connection and participate in Connection activities who affirms the principles and goals of the UU Women's Connection.

Nursing babies and very young children may attend UU Women's Connection retreats with a parent who will be responsible for their care throughout the retreat if allowed by the facility where the retreat is held. As no childcare is provided, active children who are not old enough to participate in retreat activities should stay home, childcare scholarships are available to help defray any childcare cost.

Adolescents and Youth, ages 12 – 17, may attend UU Women's Connection retreats with a legal guardian, custodial parent or responsible adult. Adolescents and youth who are attending with a legal guardian or custodial parent will follow the adult registration process and attend as guests of their legal guardian or custodial parent. Adolescents and youth who are attending with a responsible adult who is not their legal guardian or custodial parent must have written permission from their legal guardian or custodial parent to register for the retreat. The responsible adult who accompanies the adolescent or youth to the retreat must have written permission as required by their home Congregation and a medical release form signed by a parent or legal guardian, with the legal authority to sign. If these forms are not available from the home Congregation, approved forms from the MidAmerica Region will be used. Sample registration forms may be found in the Appendices.

## **RETREAT REGISTRATION FEES**

The retreat registration fee is set by the UU Women's Connection Council. The Keynote, workshop presenters, and UU Women's Connection council members who attend the retreat may have their registration fee waived. All other retreat participants register and pay the registration fees, regardless of whether they are in attendance full or part time. An additional fee may be assessed for late registration. Participants not paying room and board fees may be assessed single day user and meal fees. Membership dues and scholarship donations may be made at the time of registration.

## **HOW TO REGISTER**

Attendees will be able to register for a retreat either on-line by entering information into a form on the website or by means of a paper form that is returned to the Registrar. Information from paper registration forms will be entered into the on line system by the Registrar. Everyone who attends the retreat will submit a registration form including the Keynote and any visitors.

The Registrar and the Treasurer will be trained to access the on line registration information, update it as needed and pull information from the system so that it can be used to assign rooms, identify dietary requirements, and verify payment status.

Before registration is posted on the website, the Treasurer and/or Registrar will identify any discounts and scholarships that will be granted for the retreat including for the keynote. The Webweaver will set up the discounts and scholarships, with quantity limits, if needed. Information will be distributed before registration begins to the keynote, workshop leaders, UU Women's Connection Council members and anyone else eligible for a discount.

## **SCHOLARSHIPS/GRANTS**

The UU Women's Connection maintains a Scholarship Fund from which a limited number of partial scholarships are provided to those UU Women's Connection members who would otherwise be unable to attend. The UU Women's Connection Council also offers retreat scholarships for Ministerial students and childcare grants. Annually, the UU Women's Connection Council will decide how much money to set aside for scholarships and grants and will determine how many scholarships and grants to offer for each retreat.

During the registration period for each retreat, UU Women's Connection members who wish to apply for a scholarship can do so online, through the UU Women's Connection website. If their request for a scholarship is approved, the Registrar will provide them with registration and payment instructions. Anyone may apply for a scholarship or grant but new applicants will be given preference over someone who received another scholarship in the same calendar year. Anyone interested in applying for the scholarship for Ministerial students should contact the Treasurer directly.

Scholarship and grant descriptions are included in the appendices. For each retreat, this information will be updated to include the deadline for scholarship and/or grant application, the contact person, and any description of information that should be submitted with the application. This information will be incorporated into an on-line scholarship application by the UU Women's Connection Webweaver. The on-line scholarship application will be available on the UU Women's Connection website.

Information about the availability of scholarships and grants will be included in on-line and print advertising for the retreat.

A three-person committee will be appointed by the UU Women's Connection Council to administer the scholarships. The Committee will include the UU Women's Connection Treasurer and the Registrar, if the Registrar and the Treasurer are not the same person. Additional members of this

Committee will be named by the UU Women's Connection Council. This committee will review and approve applications for scholarships including Ministerial student retreat scholarships and childcare grants. If applications for scholarships or grants are received for members of the Committee, the UU Women's Connection Council will be informed.

## **APPENDICES**

- 1. History of Spring and Fall Retreats**
- 2. Schedule of Themes and Elements for Major Retreats**
- 3. Keynote Travel Compensation**
- 4. Current Spring Retreat Facility Information and Pricing Sheet**
- 5. Current Fall Retreat Facility Information and Pricing Sheet**
- 6. Brochure example**
- 7. Current Registration Forms**
- 8. Confirmation Letter example**
- 9. Retreat Evaluation Form**
- 10. Program Schedule example**
- 11. To-Do List example**
- 12. Financial Recap form (Budget Report)**
- 13. Vendor Registration Form**
- 14. Keynote Contract Template**



## **APPENDIX 1: History of Spring and Fall Retreats**

The Spring Conference is an outgrowth of the 1960's merger between the Unitarian and the Universalist denominations and the associated Unitarian Women's Alliance and the Universalist Women's Federation. The members of the CMwD-UUWF (Central Midwest District Unitarian Universalist Women's Federation) came together each spring from 1962 to 1998 at the Allerton House Conference Center in Monticello, Illinois to enjoy the opportunity to be together with other liberal women to study issues, exchange ideas, share experiences, and just have fun. They were convinced that it was the ideal location for their conference and annual meeting. But, due to increasing use of the conference center for University of Illinois scheduled events, the CMwD-UUWF conference had to find a new home. The conference has been held in several locations including hotel venues and King's House in Henry, Illinois. In 2006, it was decided to move the spring conference to Pilgrim Park Camp near Princeton, Illinois.

The Lake Geneva Fall Retreat was initiated by the Women's Alliance of the Rockford, Illinois Church. Having held retreats for their own members at George Williams College for about ten years, in 1981 they invited other women within the district to join them. Since then, district wide attendance and participation has increased to its current (2007) levels. From 1983 on, individuals or women's groups have taken on responsibility for planning and holding the retreat from other UU churches within the CMwD.

At the CMwD-UUWF annual meeting on June 4, 2005 the name of the organization was changed to the Unitarian Universalist Women's Connection. At the 2017 annual meeting, the UUWC Council decided that all events would be called retreats.

Both of the spring retreat and fall retreat are sponsored and organized by the UU Women's Connection. Women and Religion Womanspirit, Inc., and/or other groups offer other gatherings of Unitarian Universalist women such as WomanSpirit (a winter conference). These are publicized in Connection newsletters and promoted at the fall and spring retreats.

**APPENDIX 2: Schedule of Themes and Elements for Major Retreats**

<b>Date</b>	<b>Direction</b>	<b>Element</b>
Spring 2018	East	Air
Fall 2018	South	Fire
Spring 2019	West	Water
Fall 2019	North	Earth
Spring 2020	Spirit	
Fall 2020	Above and Below	
Spring 2021	Within	

### **APPENDIX 3: Keynote Travel Compensation**

The following guidelines will be used to determine the appropriate amount to compensate Keynote speakers for travel. The keynote is expected to make their own travel arrangements between their home and a location near the retreat. If possible, members of the UU Women's Connection Council will assist with local transportation needs.

1. Airfare – The UU Women's Connection will reimburse for airfare between the keynote's home city and the least expensive major airport near the retreat location. For retreats in Racine, WI, flights to ORD, MDW and MKE should be investigated; for retreats in Princeton, IL, flights to ORD and MDW should be investigated.

UU Women's Connection reimbursement will be based on lowest 21-day advance non-refundable coach ticket. This ticket price will be used as the basis for reimbursement for other means of transportation to include driving or train in lieu of flying

2. Ground Transportation – We will reimburse for reasonable ground transportation costs between your home, the airport and retreat site;
  - a. Mileage for use of your personal auto according to the current IRS rate, and the actual cost of tolls, if any.
  - b. Parking at the airport
  - c. Taxi, airport shuttle, car service or bus between home and the airport, as well as between the airport and retreat location
  - d. We do not reimburse for rental cars unless specifically approved in advance.

Meals and Incidentals – We will reimburse you for reasonable expenses while you are traveling including reasonable expenses for meals while you are enroute to or from the retreat location. Not reimbursable are such items as reading materials, airline club fees, gift shop purchases, or alcoholic beverages.

Guests, Spouses & Family Travel – We do not reimburse for any expenses of family members, pets or guests who may be traveling with you.