United Methodist Rio Texas Conference (RTC)
Fee Based Event Policy

Fee based events are ministry events offered by the Conference and funded by various 
sources including, but not limited to, registration fees. Each of these events should be 
supported by thorough budget preparation and event management cost controls. The 
goal of this policy is to assure that each event has been prepared for Sources and Uses 
of funds to minimize risk of financial liability to the ministry and to assure a successful 
ministry experience for registrants.

The policy has several parts:
- Budget Preparation
- Contract Review
- Risk Flow Timeline
- Staffing Procedures
- Cancellation Policy
- Refund Policy
- Others as needed

Budget
- Sources of Funds
  - Fee Setting Policy based on per person fees
  - Collected by group, most often
  - Early Bird Discounts may be offered
- Scholarship Support
- Conference Budget Support
- Merchandise Sales
- Administrative Support added percentage

Uses of Funds
- Provision for Risk Reserve
- Provision for Camper Day Insurance
- Speaker Contracts
- Performer Contracts
- Paid Staff
- Volunteer Staff Comps
- Program Fee
- Lodging and Food
- Venue Contracts
- Production Company Contracts
- Technical Audio/Video Support
- Materials, including items for sale
- Miscellaneous
- Administrative support costs

The budget should be prepared and approved by the sponsoring RTC agency. Then the 
sponsoring RTC agency submits the budget to be certified by Treasury Services before
the event is promoted, the speakers are contracted, and the registration begins. The
time line for budget preparation could be 11 months prior to the beginning of the event
through the event end. The Risk Flow Chart should identify the amount of risk
associated with cancellation, poor registration, or other factors which risk the financial
viability of the event. For example, the risk should be measured monthly from the 1st to
the 11th month to access the need for refund, cancellation, and risk reserve in the
budget process.

Refund Policy
This policy governs the refund of registration fees for participants who cancel or
do not attend. Currently this policy is administered as No Refund once the registration
has been submitted. There is a deadline given for registration to be submitted but
effectively the policy has been once registration is submitted and fees paid, there is no
refund. “No Refunds” should be included on the registration brochure. Registrations can
be added when space allows but the registration cost to the group submitting the
registrations is fixed when submitted.

Cancellation Policy
This policy governs the refund of registration fees for participants when the event
is cancelled by the ministry offering the event. This means the event is cancelled by the
choice of the provider. There are several options currently discussed:
   a. No refunds, participant bears all the risk
   b. Partial refund, participant shares in the risk
   c. Full refund, the event has sufficient cash reserve to refund all fees.
      a. Reserve can be managed by purchasing Event Insurance
      b. Reserve can be managed by holding a cash reserve.
   d. Allow registration fees to apply to future event; however, this is the same as a
      full refund.

Accompany this policy with sample Budget Worksheet and Risk Management Profile.

Paid Staffing Procedures
Persons staffing the events should not be the same persons setting the budget.
Honoraria are considered compensation when paid because they are taxable
transactions for services rendered.

Contract Review
Contracts with vendors, performers, and speakers should have uniform
conditions approved. The contracts should be included with the budget for approval by
the RTC agency and then submitted to Treasury Services.