

January 14, 2015
Agenda Item 13a2

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January 2, 2015

TO: CALAFCO Membership
FROM: Pamela Miller, Executive Director
RE: New CALAFCO Policy Effective January 1, 2015

Happy New Year to all! May 2015 bring all the best.

As you know, the CALAFCO Board updated several policies during 2014. One significant policy that took effect January 1, 2015 relates to credits for workshops and conferences, Section 4.2 in the CALAFCO Policies & Procedures Manual. The Refunds Section has been inserted below for your reference. The changes made by the Board this year are noted in italics and with a “7” at the end of the sentence (those with a “1” at the end of the sentence are previous policy changes).

The change in summary: Effective 1/1/15, CALAFCO will no longer offer credits in the form of a “carry-over” of registrations. If your LAFCo has a credit currently on the books from either the 2014 Staff Workshop or Annual Conference, it will be honored in 2015.

Going forward, no credits will be issued. There will still be refunds (minus the administrative fee) if the cancellation is received within the required timeframe. This change was made after long Board deliberation. The cancellation policies will be clearly visible on all registration documents as they have been in the past, and as a reminder for you during the registration time period, I will provide periodic reminders of the new policy. If your LAFCo does not have its own reimbursement policy for event registrations, you may want to consider creating one.

The entire Policies & Procedures Manual can be found online on the CALAFCO website in the Resources-Library-CALAFCO section. You must be signed in to access the document.

Refunds

Registrations for conferences and workshops are considered complete upon payment of the registration fee.

The cancellation deadline shall be established by the executive director for each event and is a specific date no more than ten (10) business days prior to the commencement of the event¹. Cancellation requests made in writing at least 20 days prior to the event shall receive a 100% refund less a \$20 handling fee¹. Until December 31, 2014⁷, written cancellation requests made within 20 days but prior to the cancellation deadline¹ will receive credit for the fee paid, less a \$20 handling fee¹ which may be applied to the next scheduled conference or workshop.

Special fees paid—such as guest meals or field trips—shall be fully refunded less a \$20 handling fee⁷ if a cancellation request is made in writing prior to the cancellation deadline. *Special fees paid shall be fully refunded if the special event is cancelled.*⁷

There shall be no refunds or credits for any cancellations made after the cancellation deadline¹.

Registration and special fees are transferable at any time to another person if the request is made in writing, *and is subject to a \$20 handling fee*¹.

*Until December 31, 2014, a LAFCo may carryover ONE canceled or unused registration credit per event, providing the proper notice is provided to CALAFCO as noted above. A workshop credit may be carried over only to the next scheduled workshop. A conference credit may be carried over only to the next scheduled conference. All credits will be valued at the amount paid minus a \$20 handling fee. Effective January 1, 2015, there shall be no credits issued for any cancellations made after the cancellation deadline.*⁷

Please contact me with any questions you may have about the change in policy.

Thank you,

A handwritten signature in blue ink, appearing to read "Pamela Miller". The signature is fluid and cursive, with a large initial "P" and "M".

Pamela Miller
Executive Director