

# SOAR 8 RECOVERY CONVENTION AND BUSINESS ASSEMBLY

## **Final Financial Report of Hosting Committee Charlotte, NC – March 13-15, 2026**

Focus: We made decisions to focus on giving people the opportunity to hear as many different speakers as possible, to get a hotel with free shuttle service from the airport. We decided not to have a boutique as a fund raiser for several reasons. Our intergroup has been having a yearly retreat where people bless each other with clothes at no cost. Any space would at the hotel would be remote from the other activities or too public and the ad hoc chair was concerned about tax issues over selling products. We did not focus on fund raising activities; we focused on people letting participants hear other people's recovery stories.

We took multiple forms of payment for registration and meals – credit cards (CC) which incurred a .03 transaction fee, Zelle and checks which did not have a fee, scholarships and payments by the Region thru Zelle. The majority of payments were by credit card. There were no additional fees when a credit card payment was refunded. I am making one chart for counts of registrations and types and a different report on dollars collected and spent.

Financial Notes: The contract with the hotel estimated \$7,277.24 and it specified us paying for all charges by January 27, 2026. The hotel took a deposit of \$500.00 in July of 2025 and didn't take the rest of the money until March 12-13, 2026. The total that went to the hotel was \$7,711.04.

Please note: The hotel contract was based on us achieving a certain number of lunch and dinner meals. While we put 30 rooms in our hotel block – a mix of rooms with one king and two queen beds, we were not penalized if we did not use the rooms. We ended up using all the rooms in our block and more people registered after the block was filled. There was not a significant price difference for those that got the convention rate and those that didn't.

We rented the ballroom for the recovery convention and two rooms for the business assembly. The rooms were free if we met our food commitment. The room charges without the meals were \$675 a day for Earhart (where the convention met) and \$325 a day for Kitty Hawk (where the business assembly met) and \$175 for the Wright Brothers Board Room. We only rented Kitty Hawk for Friday and Saturday and rented the other two spaces for all three days.

We also charged more money for each meal than the hotel had quoted and we encouraged people to bring friends to the meals.

The contract with the hotel was for 80 lunches and 80 dinners on Saturday. We allowed three meal choices for the banquet entrees and each had a different price point – for the hotel and what we charged. We encouraged people to register by identifying those that had not chosen meals and sent them a separate form letting them know there was still time. This was useful as more meals were purchased.

Most people paid and attended. A few cancelled in time for a refund. Some cancelled after the refund. Most were fine with donating their payments to anyone who needed it. Two people registered, didn't attend and didn't pay. At least one person paid and didn't attend. A few people bought additional meals, either to give as a scholarship or because they did not understand how to fill out the form.

Not all of the meal cards were made were used for dinner due to issues above. I didn't keep a final count of meals eaten.

A few people registered the night before the convention on line.

Anyone who asked for a scholarship received one for the registration fee. Only one person asked. We used some scholarship money to pay for meals including lunch for the taper and those that requested help with meals We paid one person's shared hotel room because to avoid issues with the hotel for parking a camper at the hotel parking lot.

We failed to collect a 7<sup>th</sup> tradition except near the end of the event. It was a failure on our part to realize it was a requirement. This could have been prevented with a through reading and comprehension of the convention manual and experience at other conventions / assemblies.

### Statistics

	Count	\$ Value before CC fees
# Registered Early Convention @ \$50	35	\$1,750
# Registered Early Convention @ \$50, cancelled and got refund	3	(\$150)
# Registered Early @ \$50 and cancelled too late for refund	5	N/A
# Registered Late @ \$65	43	\$2,795
Two didn't pay and didn't attend, amount based on money they paid for registration and meals	2	\$115
# Registered for Saturday only Early @ \$35	7	\$245
# Registered for Saturday only Late @ \$40	13	\$520
On-site walk-ins Saturday only without booklet @ \$50	1	\$50
On-site walk-ins three days with booklet @ \$75	1	\$75
On-site walk-ins three days without booklet	1	\$70
People registering on line the night before the convention started (		
Business Assembly Early @ \$50	20	\$1,000
Business Assembly Late @ \$65	10	\$650
Business Assembly Virtual @ \$40	7	\$280
Total Number Registered (Not all attended)	146	
No show?	1	
Late Arrival	1	
Scholarships given	2	\$211
Scholarship (Saturday and Recovery) Donated	17	\$440
Region offered to pay for tech costs.		\$1,400
7th Tradition (Cash )	2	\$40
Paid Using Zelle	13	
Zelle Payments by Region for 10 funded participants. Note there were four Zelle payments made by the region	2	
Paid with Credit Card	99	
Paid with Check	3	

Meal	# Meals Purchased	Hotel Charge	Convention Charge
Dinner - Salmon	48	\$32	\$50
Dinner - Steak	29	\$42	\$55
Dinner - Vegan	11	\$26	\$45
Total Dinner	88 Purchased / 80 needed	-	-
Lunch	85 Purchased / 80 needed	\$35	\$45

<b>Expenses</b>	
Holiday Inn (Meal Charges)	\$7,711.04
Sound Equipment for Earhart and Kitty Hawk	\$3,000.00
Booklet Printing Costs	\$1,021.14
Pens for Booklet	\$154.78
Insurance	\$390.90
Taper Hotel Room and Lunch	\$320.40
DJ	\$500.00
Jewish News Article	\$264.00
Decorations and Pompoms	\$297.90
Supplies and Signs	\$122.46
Scholarships	\$211.00
	<b><u>\$13,993.62</u></b>

<b>Income (Registrations, Meals, Donations, 7th Tradition)</b>	
Cash	\$83.00
Checks	\$130.00
Credit Cards	\$13,328.71
Zelle	\$2,109.00
Due from Region (Tech Support and Funded Meal)	\$1,495.00
	<b><u>\$17,145.71</u></b>

Profit Total	<b>\$3,152.08</b>
For Region	\$1,576.04
For Intergroup	\$1,576.04

<b>Not Included as Costs Donated by Members</b>	
Website / Email System shared by IG	
Bank Charges	
Utilities on Website (tables, form builder)	
Printing Costs Donated	
Materials for Name Badges Donated	
Cards for Dinner Donated	
Labor	
Software Programs Used to Create Material	
Signage Held by Intergroup from Past Events	
Fuel Costs to Visit Facility, Pick Up Material	
Natural Awakenings Article	

<b>Hotel Charges</b>	<b>Count</b>	<b>Hotel Base Charge per person</b>	<b>Cost</b>
Lunch	<b>85</b>	\$35	\$2,975.00
Dinner - Salmon	48	\$32	\$1,536.00
Dinner - Steak	28	\$42	\$1,176.00
Dinner - Vegan	11	\$26	\$286.00
Taxes, Tips, Surcharges, Misc			\$1,738.04
<b>Total Hotel Costs</b>			<b><u>\$7,711.04</u></b>

## Chair Report

What worked well was to find people that had interests in a particular area and support them. Having a theme is very helpful to stimulate ideas that will provide integrated solutions. Have as many people as possible see the hotel. The convention/assembly experience is embedded in a particular place and having people spend time imagining how it will work in the space chosen is great. It is very helpful to have been to a business assembly and a recovery convention and observe the needs of each before doing your own. There were at least four areas that our group didn't have enough support/time to address adequately.

1) Database Technology Support, 2) Hotel Management, 3) Volunteer Coordination and 4) Expertise in the needs of the Business Assembly.

SOAR provided a hosting manual and the Region Vice Chair provided support but we did not assign someone to develop expertise with the manual. Spending a lot of time understanding the hosting manual and the needs of the business assembly will pay off. In addition to reading the manual, talking to others will help sort out what is a suggestion and what is necessary. I found myself frustrated when I tried to imitate parts of the manual without knowing that the business assembly and the convention each have their own time tables. I think understanding how and when the two functions come together and separate will make planning much easier.

I wished I had understood the Audio-Visual needs sooner and understood the equipment that was needed. Other than the hotel, the audio / visual equipment was the costliest and most complicated. Our costs would have been more but the hotel's sound system in Earhart short-circuited the day before our event and they rushed in equipment. It helped that we had spent a lot of time making sure they understood what we needed and that took a lot of communication.

We needed someone that understood how hotels manage their staff and these types of events to be focused solely on ensuring the hotel was prepared for the influx of people on Friday and had staffing for their restaurants. The last two hotels the conventions have been at do not serve food on the weekend and were unprepared for the volume. We thought insisting the restaurant be open all weekend would solve the problem. It did not. I didn't communicate the volume of traffic the hotel needed to support to feed us.

We didn't have enough people on our team that were skilled in using spreadsheets and databases to manage data and we relied on a form management system embedded in our website to collect information from the diverse participants. The system was great and it would have been a huge help **if** we either had programs or a person that would transfer the information into a database for easily accessible reports.

When we started the convention process, we already had a proven technology for registering people for events and collecting credit card payments. Even though there is a fee to use the credit cards, it is much easier to get payments done easily.

Volunteer Coordination – There are multiple ways to get the volunteers needed on site to run the event. I think it goes more smoothly at the actual convention and gets more people involved if people are assigned to jobs before the convention. However, this is a huge undertaking and requires knowing about people's schedules, arrivals and departure times, interests, capabilities, and availabilities plus have a defined schedule with a list of jobs that are needed throughout the convention. Either automation can help with this or someone can call every person and talk to them individually to collect information. Another approach is to ask for volunteers as they are needed from the people available. This is a decision your committee needs to make. I did like that we gave people their job assignments and put them in the back of their name badges and had them look at the jobs when they checked in. I did notice the one meeting I subbed for someone, the workshop was 15 minutes late getting started because there was no one around that ensured all the people assigned to roles were ready.

I was very fortunate to have a group of people I have worked with on other projects and knew their interests and values. We did have to change course with individual “assignments” when I didn’t have clarity about what was needed and how it was to be done. Nothing like experience to fix that.

We don’t spend all of our business meetings on business. We also spend time getting to know each other, meditating, and thinking about traditions and concepts.

I think it was helpful that I had a clear vision for the convention and could reach for opportunities when HP presented them. Like an artist registering for the convention and being willing to create a booklet for our convention.

## Recommendations by Hospitality Chair

1. Hotel happenings- Be sure they understand that, if our first session will begin at 4:00, then our people will descend upon the hotel at the earliest opportunity to check in. Please be fully staffed to have rooms cleaned and ready and to get our people checked in. As for restaurant hours, be sure, hotel understands that there will probably be 10 to 20 fellows wanting to sit down and eat at whatever time we get out of a session so that they will be staffed appropriately to handle restaurant guests as opposed to preparing the luncheon buffet that was ordered in advance. Explain how we are serious water drinkers and that we need a refill every few hours in the water stations. Review with a fine tooth all of the requests for room setup and find out who the point person is to go over it on morning of to be sure everything is in place. For instance, if we're asking for 30 extra chairs at back of room make sure it happens.
2. Put the info board together before coming to the Convention.
3. Someone on committee needs to be the volunteer coordinator. Some of their duties would be as follows: Prior to registration going out, make suggestions on areas of service that people can check off. While waiting for completed registrations to come in, start finding out the number of volunteers and hours needed for each area at Convention. Get ready to fill in these positions once registration forms come in. If needed, first reach out to everyone and find out their available days and hours of giving service in that particular area or areas.
4. Once the schedule is figured out, send a confirmation along with volunteer instructions to fellows for their area of service at least one week prior to Convention \* At event- as fellows check in, be there at the table to then check off the person for volunteer assignment. Or if Check-in person does this, have system in place for assignments they can't do versus ones they'd be willing to do on the info board or however it can work out best \* Have a list at the podium of who volunteered to do the service positions per meeting for speaker, facilitator, timer, reader, etc. \*Assign someone the job of texting the people who signed up to do the above service job the morning of their duty .
5. Pre- Convention correspondence between Region 8 liaison and convention chair- Get a more thorough list from Region 8 on their requirements/requests from the intergroup host so we are aware of what to expect far in advance. Some examples would be their need for and size of a PIPO table, a Ways and Means table, and whatever volunteers they are requesting. Also, if they tell us what they are displaying on their tables we can be sure not to have the same items.

## Hotel Liaison

No-one volunteered to take on this job so it was a collective effort between our hospitality chair and the ad hoc chair. Both of us were exhausted at the convention and it would have been great if someone onsite could have the one task of looking out for the convention and communicating needs to the hotel and ensuring they were addressed.

## Registration/Statistician

We did not have a dedicated person for this as we needed an intermediary process to make the data collected easier to process. One of the people that had volunteered for this job was unable to see the email system correctly on her computer. It would be nice to have set up and keep updated multiple email lists for the registrants. – Business Assembly, # Day Recovery Convention, Saturday Recovery Convention, Virtual Business Assembly.

## Treasurer

We did not have a dedicated person for this role. Since so much of the payments were set up electronically as credit card payments the treasurer needed to be skilled with managing and creating ad hoc report from spreadsheets and multiple systems. Our intergroup had a surplus of money before the convention and had negotiated the hotel to reasonable costs and the team was creative and frugal about spending resources.

## Programming

We were clear on this. The group made decisions on the topics and the speaker seeker found and negotiated with the volunteers to get the positions filled and to communicate expectations and send reminders to each of the speakers.

Each speaker was asked to text the speaker seeker when they arrived at the convention so she knew they were there. Before the time of each session, the speaker seeker located the speaker or texted to make sure they were ready. Each session was for 45 minutes with 15 minute breaks in between. There were between 1-3 speakers depending on the topic.

Another person created the meeting formats and found topic specific meeting readings for each of the sessions so they were cohesive, and all contained in one book. All the release forms were put in the same book and we talked through this process as a group and implemented the plan.

We identified the schedule and topics early in the process. This was the most efficient and effective area of our convention.

We considered doing a skit but ran into copyright and timing issues and then HP suggested using the talents of our OA members and we invented our own songs for the convention and it was fabulous. We discovered in order to use characters to create our own skit, the characters needed to be in the public domain. For instance Mary Poppins as portrayed by Disney is not in the public domain but Winnie the Pooh as portrayed by A.A. Milne is in the public domain. One of our songs used music that was in the public domain, *Take Me out to the Convention* and the other had original music and words. We also had one of our members create original art work for our images.

We were able to find a local DJ and someone suggested we bring pom poms for our *Welcome Song of Take Me Out to the Convention*. The pom poms were also used at the dance. It was joyful.

## Souvenirs (Booklet)

Our intergroup is used to giving away something for each participant as we do at our Mountain of Miracles retreat. We discussed the idea of having something with the convention picture/theme on it and printing shirts seemed too complicated and expensive so we thought of creating a booklet. HP provided the perfect creative person and we made it happen.

All images, clip art and pictures used were researched and documented that they were obtained from sources that fell under public domain that were not subject to copyright and they were free to be used. Verbiage used

in conjunction was handled in the same manner along with referring to oa.org to properly cite the source from OA literature. Not only was it informational and convenient to take notes in, but it reflected the theme of soaring in a hopeful and thought-provoking way to coincide with the workshop titles.

## Taping / Recording

We used the same company that taped last year's assembly convention. We had several discussions about this topic and considered two vendors, created release forms and discussed what to do with material after the convention.

## Intellectual Property Issues

We discovered that we need a license to play music – even music we as individuals had purchased. We discovered the hotel had a license to play music and we didn't need to get one for the night. We worked with oa.org to discern how much or what we could print and how to cite it to give credit to the sources.

## EVALUATIONS Summary

We used the same form builder that we used to create registration forms and mailed these out. It would have been nice if they were available immediately after the convention or if we had left a few minutes on Sunday morning for people to fill out on their cell phones.

The evaluations were favorable. I am including the convention survey and the business assembly survey. Please note that I asked both groups if they flew to the convention assembly and of those that flew I asked if it was important to have a free shuttle to the hotel. For the respondents it was very important or important. We used the questions from the handbook for the business assembly and created our own questions based on we wanted to know to inform us for the next convention.