



## Regional Workshop Manual

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## Introduction

As part of the 1993-95 Region V Strategic Plan, the Region V Executive Board decided to develop a workshop manual for NAI's Region V Workshop. This was done for several reasons:

- To provide between one Workshop and the next continuity of...
  - Time of year
  - Considerations in site selection
  - Cost
  - Program quality/format
  - Associated workshop activities
  - Timing when materials and announcements are sent to members
- To provide guidance for the steering committee in the areas of...
  - Sub-committee development/appointment
  - Task identification
  - Timeline preparation
- And supported by....
  - Answering questions and addressing policies related to workshops

A considerable amount of thought energy and effort is presented by this manual. It is the compilation of several documented workshops in Region V since the inception of NAI. The efforts of these past steering committees should help current ones from re-inventing the same workshop wheels.

This manual is not an attempt to do your workshop planning for you; as you get deeply into the process, you will realize that it is not a cookbook, nor is it meant to be! It is not the intent of this manual to dictate workshop content to the extent that each event replicates previous years' effort. One hallmark of Workshops is the local color the steering committee brings to each event. We have a geographically and culturally diverse region, which is the major strength for workshop planners.

It is the intent of the Board that this manual assists steering committees who have, to a certain extent, had to begin anew with the planning of each workshop. Since Workshops often attract over 100 participants, and may take up to two years to plan, the need for assistance is evident.

The Board has approved general workshop guidelines (as contained in this manual) that prescribe certain aspects of every Workshop. The attempt has been made to simplify the manual format without compromising the amount of detail that will be the most useful to steering committees. For that reason, it has been divided into sections according to sub-committee responsibilities so that each section can be removed, photocopied and handed to the appropriate sub-committee member. Each section contains a position description, worksheets relevant to the job and a list of hints helpful to performing the job.

In 2013, this manual went under heavy revision to incorporate organizational changes that had taken place over the years and incorporate member feedback. In 2015, regions became organizational units and geographic borders removed. Our name became the Heartland Region.

## Workshop Guidelines

There are certain workshop guidelines that have been approved by the Board. We will begin with these “givens”. Although sub-committee chair positions are referred to in this section, further development of position descriptions will take place later in this document.

Exceptions to these guidelines will be considered by the Regional Board on a case-by-case basis.

### Workshop Name/Logo/Slogan

- The title for the workshop will be the “National Association for Interpretation Heartland Region Workshop” but it can be referred to as the “NAI Heartland Region Workshop” in promotional materials.
- The NAI logo will be on all promotion materials and should follow the graphic standards set forth in the NAI National Graphics Standards Manual, available online at [www.interpnet.com](http://www.interpnet.com) (Home > Resources > NAI Administrative Documents > Manuals and Policy)
  - NAI Heartland Region logo can be downloaded on the region website located at [www.naiheartlandregion.weebly.com](http://www.naiheartlandregion.weebly.com) on the Business page.
- The slogan is determined and developed by the workshop committee. It provides unity for the overall program and activities, but does not necessarily dictate the content of all program sessions. The slogan should reflect the workshop location and/or address current issues related to interpretation. The slogan should be used in conjunction with the workshop logo to readily identify the workshop.

### Site Selection

- Site location should:
  - Adequately serve the logistical needs of approximately 150 people
  - Be easily accessible for participants coming from outside the local area
  - Be handicapped accessible (including meeting and sleeping rooms)
  - Have reasonably modern facilities
  - Provide excellent off-site opportunities
  - Be priced to reflect the profile of NAI’s average workshop attendee
  - Be unified: exhibit hall, lodging, and concurrent sessions in close proximity
- Lodging fees should be considered in site selection, but meeting space is of equal importance and should not be sacrificed for reasonable lodging rates.
  - NAI does not handle lodging registration or payments for workshop registrant lodging.
- Sites will attempt to rotate from state/province to state/province within the region depending on several variables:
  - Ability of the local area to host the event
  - Number of NAI members willing to serve on the steering committee
  - Geographic location of recent workshops
  - The following is a state/province rotation schedule:
    - Illinois, Iowa, North Dakota, Minnesota, South Dakota, Wisconsin, Manitoba, Nebraska
  - Should the next state/province in the rotation not have members available for

the committee, the next state/province in the rotation should be offered the opportunity to host.

- Joint workshops should be considered at the outer reaches of Heartland Region or in states without available committee members.

### **Workshop Schedule**

- The workshop will be held late winter/early spring of each year, suggested months include March and April.
- Workshops should consist of at least 2 days of programs and 1 day of 2-8 hour off-site sessions (this can vary). Wednesday evening-Saturday is usually recommended.
- Steering committees should choose workshop dates so that one weekend day is incorporated into the schedule.

### **Steering Committee Composition**

- It is recommended that committee members be members of NAI; **however, it is required that the Workshop Chair(s) and Finance Chair be members.**
- Agency support is desirable, but not essential for those on the steering committee.
- The steering committee will consist of the following chairs:
  - Workshop Chair
  - Program Chair
  - Finance Chair
  - Logistics Chair
  - Promotional Chair
  - Off-site Session Chair
  - Registration Chair
- **The following chairs are required to have attended at least one previous workshop: Workshop, Logistics, and Finance.**
- Each of these chairs should develop their own sub-committees to accomplish specific tasks, but only the steering committee chairs will have the responsibility and final authority for decision-making.
- Chairs must be committed to duties as assigned (before, during, and after the workshop) and be very familiar with their position description.
- Expect to not attend the entire workshop as a chair.

### **Finances**

- A net profit (above and beyond seed money) of at least \$4,000 will be built into workshop budget including proceeds from the auction, workshop related fundraisers, and registration/off-site session fees. This money will go into the general operating funds of Heartland Region.
- The budget should be based on 85 participants.
- The Workshop should be reasonably priced so that interpreters without agency support may participate without undue financial burden.
- Spouses and students should be encouraged to participate with reduced registration

fees.

- On-site registration fees should be higher than pre-registration fees to a significant enough degree that participants are encouraged to register early but not so outrageously different that it discourages those who find out late about the Workshop.
- Non-member registration must be marked up sufficiently to include a six-month basic membership in NAI.
- The sum of individual day registration fees must exceed the cost of a full registration.
- Steering committee members will be responsible for paying the fixed costs, such as meals, keynote expenses, etc, as approved by the Regional Board upon recommendation by the Workshop and Finance Chairs.
- When financially prudent, committee members may be offered a slightly reduced registration rate, as approved by the Regional Treasurer, of no more than a 15% reduction for committee chairs and/or committee members. This rate refund is optional with participants receiving the refund after the workshop has taken place. The reduction must be off of the profit portion of the registration fee and not go into hard costs.
- The Finance Chair will be responsible for coordinating financial arrangements with the Regional Treasurer and the National Office.
- All requests for payment should be no more than 30 days following the Workshop. Regional Treasurer must be notified of all late expected incoming requests prior to the last day of the workshop.
- A proposed budget for the Workshop must be developed and presented to the Regional Board for approval at the spring board meeting, a minimum of 12 months before the scheduled Workshop.

### **Contracts**

- All contracts (for hotel space, audio-visual rental, draped exhibit booth, etc.) must be signed by the Workshop and Finance Chairs.
- It is essential for contracts to:
  - stipulate that final payment be made no more than 30 days after the close of the Workshop
  - include a non-compliance clause, “a penalty of up to 15% will be imposed on any contractor who fails to comply with all the terms of the contract”.
- Contact NAI Events Manager, Deb Tewell for assistance with contract negotiations. To contact her call 888-900-8283 or e-mail dtewell@interpnet.com.

### **Publicity**

A promotional flier will be sent to Heartland Region members and other potential conferees announcing dates, location, etc 12 months prior to the Workshop. Contact the Deputy Director for mass e-mail and social media access.

- Call for Presenters will be distributed 8 months prior to the Workshop. If possible, have the Call for Presenters available at the preceding year’s Workshop to maximize publicity.
- Call for Presenters should give the following information about the Workshop:
  - Slogan
  - Dates and location of the Workshop
  - General lodging information

- Overview of the area
- Highlights associated with the Workshop (i.e. keynote speakers, round tables, off-site sessions, entertainment, etc.)
- Selection criteria for presentations
- Deadline for receiving proposals (4-5 months prior to the Workshop)
- Name, mailing address, and phone/fax/e-mail of Program Chair.
- Membership information for NAI and ask for the following information
  - Day and time options for presentations, if applicable.
  - Presentation title and description
  - Name, address, position, agency or organization, phone, fax, and e-mail
  - Any other information you may need to select or schedule presentation (i.e. maximum number of participants, type of presentation, lecture, hands-on demonstration, audio-visual needs, requests for special room set-up)
- Registration packets will be printed and distributed 4-5 months prior to the Workshop
- Registration materials should include the following:
  - Slogan
  - Dates and location of the Workshop
  - Lodging registration information
  - Name, address, phone, fax, and e-mail of steering committee
  - List of presenters/topics
  - Off-site sessions and costs
  - Workshop fees
  - Directions to host town and lodging
  - Special instructions on weather or dress
  - Schedule of events
  - Give credits to agencies and organization involved in workshop planning and sponsorship
  - Registration form containing
    - Delineation between member and non-member fees
    - What's included in registration fee (special events, off-site, etc.)
    - Choices for off-site sessions and room for ranking of 1<sup>st</sup>, 2<sup>nd</sup>, and 3<sup>rd</sup> choice
    - **A clearly stated refund policy that is adhered to strictly**
- All promotional materials should contain the Workshop logo and slogan as well as the proper NAI Heartland Region logo.
- Whenever possible, the steering committee should use soy-based printing inks and recycled paper for printed materials
- Consistent names of workshop materials should be used year to year (i.e. program bulletin instead of agenda and exhibit hall instead of trade show)

- Materials should be sent out at the same time of the year so members know when to expect information about the Workshop (refer to Workshop Timeline)

## Workshop Content

- The Workshop slogan should be developed around a locally appropriate topic and this should be used to tie a common thread throughout.
- Over the years, attendees of Workshops have come to expect a certain level of quality and content. These “givens” will take place at every Workshop:
  - Concurrent sessions with evaluation
  - Exhibit hall
  - Keynote speaker(s)
  - Business meeting and Board meeting
  - Off-site sessions
  - Auction
  - Awards/Recognition banquet
  - Pre-workshop activities (optional)
  - Music room as an informal gathering space for spontaneous entertainment
- A majority of the program content will be from volunteered papers, selected by the program sub-committee.
  - Program Selection Criteria:
    - Originality and creativity of topic/technique
    - Potential to attract, stimulate, and educate participants
    - Relevance to the profession of interpretation and proposed topic category. (Although it may be recommended that concurrent sessions follow the Workshop slogan, requiring it will limit submissions.)
    - Clarity of idea, content, presentation method(s)
    - Inclusion of hands-on activities, techniques, and audience involvement
- **No speakers may be paid for their presentations or reimbursed for expenses unless all workshop participants will benefit from the presentation (i.e. keynote speakers or general session speakers, not concurrent session speakers).**
- All concurrent session papers should be volunteered.
- Session topics shall include interpretive skills and techniques, natural and cultural history, and interpretive program management.
- No program should be presented during a meal. General sessions, such as keynote speakers or awards, can be begin after the meal has been cleared.
- Eight hours of Exhibit Hall exposure to workshop participants is required.
- One booth at the Exhibit Hall will be reserved for the Heartland Region tabletop exhibit. There will be no charge to Heartland Region for this space.

## Logistics

- There should be a minimum of 3 meeting rooms for concurrent sessions
- Whenever possible, use glass, silverware, and china for meals and encourage recycling during the Workshop by providing recycling bin location. In the past, it has been suggested that participants bring water bottles and to-go cups to reduce impact.
- The steering committee should look into the feasibility of providing access to child care. Cost for child care would be the responsibility of the registrant, not NAI.



## Special Events and Off-site Sessions

- Registrants will have first option for off-site sessions and special events. Non-registered participants will be allowed to attend these on a space-available basis only.
- A silent auction should be held before the live auction in order to reduce the number of items in the live auction.
- Off-site sessions will be planned for sites near the workshop location that demonstrate interpretive services in action. It is recommended that off-site sessions are within one hour driving distance of workshop location. Off-site sessions emphasizing recreational activities are discouraged.
- **All off-site session participants need to have a filled out waiver/liability form before participating in the off-site session (see form example in this manual). It is recommended that this be done during workshop check-in and filed with registration information if registrant paid with check, not online with a credit card.**

## Evaluations

- After a workshop, an evaluation form for participants should be developed in conjunction with the Deputy Director to collect information on the participant's experience, helping future workshop steering committees. This can be e-mailed to participants or be made available as a link on the regional website.
  - Evaluations should evaluate individual sessions and events and the overall Workshop.
- During the workshop, evaluations should be provided at the end of each concurrent session. Evaluations may be collected and turned over to the Program Chair before being sent to concurrent session speakers after the workshop has ended. The Program Chair should collect significant notes on topics and the speaker's abilities and provide a summary of concurrent sessions as part of their report.
- After the workshop, evaluations will be sent out to the committee by the Deputy Director. Committee members should keep notes on what parts of this manual should be adjusted/updated, what parts of the planning process can be improved, what information would be helpful to future committees, etc as this will be part of the report. The report is due within 30 days of the workshop.
  - The final report will include:
    - Committee reports (to be filled out by chairs and committee members)
    - Chair reports (to be filled out by chairs only)
    - All documents associated with the workshop including the budget, registration booklet, concurrent session schedule, program, all contracts, etc.

## Workshop Objectives & Support

The objectives of the Workshop are to:

- Have a successful event, measured by an evaluation, so that participants leave with something they can use; ethical or technical knowledge or skills, and the desire to attend future workshops.
- Give participants the opportunity to experience prominent historical and natural features in and near the workshop venue through special events, programs, and off-site sessions.
- Permit a broad range of high quality presentations that are guided by the workshop slogan to be given with volunteered papers.
- Make the Workshop affordable and accessible to both students and field interpreters.
- Seek a balance between workshop content and social events.
- Increase Heartland Region membership
- Ensure that the Workshop sessions address the matters of national and regional concern and include diverse range of topics to interest different kinds of NAI members (natural history, cultural history, management) and include both demonstrations of skills and techniques and examples of successful programs
- Seek, through promotions, an attendance of at least **20% of the Heartland Region membership**
- To net a profit for the Region of at least **\$4,000**

### Support Services

Below are support Services available from the Regional Board and National Office:

- Seed Money.....Regional Treasurer
- Financial Procedure Consultant.....Regional Treasurer
- Contract Negotiation.....NAI Events Manager, Deb Tewell
- Help, Suggestions, and Moral Support.....Deputy Director
- Workshop Manual/Policy Interpretation.....Deputy Director
- Address labels, stationery, envelopes.....National Office

## Workshop Timeline

The following guidelines are suggested as minimum standards; however, the calendar may be altered to suit the needs of a specific steering committee with approval from the Regional Board.

### Key:

Committee = Steering Committee  
 DD = Heartland Region Deputy Director  
 WC = Workshop Chair  
 Fin = Finance Chair/Sub-committee  
 Treas = Heartland Region Treasurer  
 Prog = Programs Chair/Sub-committee  
 Promo = Promotions Chair/Sub-committee  
 Trips = Off-site Sessions Chair/Sub-committee  
 Log = Logistics Chair/Sub-committee  
 Reg = Registration Chair/Sub-committee

Months Prior to Workshop	Task	Responsibility
30	Contact Deputy Director of Regional Board to discuss workshop and associated manual	WC
	Contact local NAI members and interested non-members to determine level of committee and agency support	WC
	Contact potential sites for prices/meeting spaces/available dates	WC
24	Submit proposed location and dates to Deputy Director	WC
	Review proposal (location, dates, set)	Regional Board
	Develop workshop logo and slogan	Committee
	Confirm committee chairs	WC
	Develop promotional plan for distributing materials	Committee
	Set meeting schedule for committee	WC
	Sign contract for site, work with NAI Events Manager	WC/Fin
	Develop current timelines for various committees	Committee
	Solicit corporate and sponsorship support	Promo/Fin
18	Write article for Buffalo Bull	Promo
12	Coordinate workshop finances with Regional Board Treasurer and National Office	Fin/Treas
	Develop draft budget (each chair contributes)	WC/Fin
	Develop program guidelines	Prog
	Contact potential keynote speakers	Prog
	Identify special event activities	Prog
	Attend Regional Workshop (highly recommended)	Committee
	<b>Workshop, Logistics, and Finance chairs are required to have attended at least one workshop.</b>	

	Presentation of Workshop at current Workshop	
	Distribute workshop announcements to members and other interested parties/organizations	Promo
	Identify advertising opportunities in publications and contact editors for deadlines with special interest groups	Promo
	Develop fundraising ideas with help of Regional Fundraising Chair	Promo
	Obtain site layout for exhibit hall and presentations for program bulletin	Log/Promo
	Determine off-site session locations, topics, participation limits, and fees	Trips
10	Develop draft call for presenters	Prog
	Propose final budget to the Regional Board	WC/Fin
8	Confirm keynote speakers	Prog
	Preliminary identification of volunteers needs	Log
	Send out call for presenters, contact DD to send out	Prog
	Identify corporate sponsors	Prog
	Contact Certification & Training Prog Manager at National if you're putting on a certification training	Prog
	Develop list of potential exhibitors	Prog
	Determine exhibitor fees, hours, tables, etc	Prog
7	Draft of registration brochure	Promo/Reg
	Determine space locations at the site	Log
	Determine commemorative items (if any)	Promo
	Deadline for presenters to submit proposals	Prog
	Invite potential exhibitors	Prog
	Solicit advertising for program bulletin	Prog/Fin
	Finalize registration brochure and send out	Prog/Reg
	Solicit auction items	Promo
	Review submitted presentations	Prog
	Confirm presenters (including alternates) and notify them of acceptance or rejection	Prog
5	Confirm transportation for off-site sessions	Trips
	Finalize prices, lunches, and itineraries for off-site sessions	Trips
	Provide Logistics Chair with catering and transportation needs	Prog/Log
	Make arrangements for recycling	Log
	Determine food and beverage requirements with site, including vegetarian options	Log
	Identify registration space needs	Reg
4	Solicit 'local' article for the program bulletin	Prog
	Get meeting room floor plans for program bulletin	Prog
	Preliminary identification of signage needs	Committee
	Solicit local and student volunteers	Log
	Locate auctioneer	Promo
	AV needs to Logistics	Prog

	Finalize volunteer needs to Logistics	Committee
	Contracts with AV company or obtain donated equipment and bodies from local agencies to run it	Log
	Contact site or local company about exhibit hall setup (i.e. table skirting, number/configuration or booths)	Prog
	Confirm leaders for off-site sessions	Trips
	Confirm off-site session details with sites to be visited	Trips
	Schedule departure and return times for program bulletin and write site descriptions	Trips
	Send out registration packet	Prog/Reg
	Enter registration system onto computer	Reg
	Establish system for invoicing for registration fees	Reg/Fin/Treas
3	Order name badges	
	Send confirmation letters to participants	Reg
	Prepare program descriptions for pre-registration and program bulletin	Prog
	Develop training and orientation for volunteers	Log
2	Deadline for receiving abstracts, etc from presenters	Prog
	Get letters of welcome from WC and Regional Director for program bulletin	Prog
	Get security in place, if needed	Log
	Locate "goodies" for registration packet	Reg
	Finalize signage needs for Logistics	Committee
	Draft program bulletin	Prog
	Deadline for exhibitors to sign-up for exhibit hall	Prog
	Setup system with Registration and Prog for recording and collecting income	Fin
1	Develop supply list for on-site needs	Committee
	Confirm off-site session lunches	Trips
	Cut-off early registration	Reg
	Confirm all transportation needs	Log
	Develop master list	Committee
	Exhibitor sign-up deadline	Prog
	Camera-ready art due for program bulletin	Prog
	Finalize list of exhibitors for program bulletin	Prog
	Confirm volunteers	Log
	Prepare certificates of appreciation (if needed)	Log
	Secure message boards and job board	Log
	Coordinate welcome reception	Prog
	Program bulletin to printer	Prog
0.50	Put together participant list	Reg
	Refine master list	Committee
	Train volunteers	Committee
	Print out auction forms, concurrent session evaluations, trip tickets, and other signage and worksheets	Committee
	Prepare daily function sheets	Log
1-2 days	Arrive at workshop site	Committee

	Setup AV materials/registration area/workshop office	
	Deliver office equipment and supplies	
	Assemble registration packet	Reg
	Install all signage	
0	<b>Workshop Time!!</b>	
	Update participant list	Reg
	Troubleshoot and be pleasant to everyone	Committee
	Recruit any last minute volunteers (scholarship recipients, etc) and train	Committee
<b>Months After Workshop</b>		
0.25	Request data from lodging site on actual numbers of sleeping rooms the group utilized	Log
	Workshop evaluation sent out to participants or provided on the region's website	WC/DD
1	Finances finalized and purchase orders invoiced	Fin/Treas
	Send out 'Thank You's'	Committee
	Committee reports submitted to WC and DD	Committee

## Workshop Chair

Congratulations! You are the glue that holds the Workshop together. It is your general responsibility to understand what the sub-committee chairs are doing and to guide them, in a unified way, to the culminating event- the Workshop. You will spend many more hours than you think you will, but if you know this ahead of time, you won't have to deal with it unexpectedly!

### Selecting a Workshop Steering Committee

- The steering committee will consist of the following chairs:
  - Workshop Chair
  - Program Chair
  - Finance Chair
  - Logistics Chair
  - Promotional Chair
  - Off-site Session Chair
  - Registration Chair
- Chairs shall be selected based on the following criteria:
  - Ability to meet on a regular basis
  - Ability to work well with others
  - Are current NAI members
  - **Previous workshop attendance preferred, but required for Workshop, Finance, and Logistics Chairs.**
  - Proven leadership and organizational skills
  - Support of employer
  - Commitment to complete duties as assigned during the planning process and workshop, including follow-up activities
  - Skill or proficiency in the area assigned (this means you need to read the sections for each chair and know their position description before you invite them to be on the committee). See the position descriptions in this manual required for each chair.
- **Each of these chairs could develop their own sub-committees to accomplish specific tasks, but only the steering committee will have the responsibility and final authority for decision making.**
- In addition to other specific duties, chairs will:
  - Develop a detailed timeline for tasks and track accomplishments of their sub-committee
  - Provide the Finance Chair with a detailed budget to include expenses, income and cost
  - Provide workshop chair with list of sub-committee members. their agency or organization, addresses, and phone/fax/e-mail.
  - Keep copies of all correspondence
  - Provide list of signage and volunteer needs to logistics chair
  - Have a copy of their chair description and a timeline for reference

## **Position Description**

### **Before the Workshop:**

- Appoint chairs
- Approve workshop slogan, logo, and promotional items
- Develop and present a workshop promotional program at prior Workshop
- Coordinate all workshop activities with steering committee members
- Develop and monitor deadlines for steering committee
- Project the number of participants so you can deal effectively with hotels/camps/resorts for meeting space and sleeping rooms -- be sure to factor in the appeal of the location, availability of other lodging nearby, accessibility, number of local attendees as well as the number of rooms needed in previous Workshops
- Coordinate lodging negotiations and continue fine-tuning contracts during planning process, if needed
- Help committee members keep on track with timeline of overall workshop duties
- Schedule dates, sites, and agendas for steering committee meetings
- Take meeting minutes and distribute to chairs
- Handle general correspondence and route incoming requests to appropriate chair
- Coordinate budget needs of all chairs with Finance Chair
- Keep Deputy Director updated on workshop progress
- Coach and cheer the committee chairs
- Identify needs for space for Regional Board and business meetings; coordinate with Logistics Chair
- Maintain an updated list of all steering committee members - names, addresses, phone/fax/e-mail
- Maintain an updated list of lodging contacts, contractors and others who may need to be contacted by steering committee, including the Regional Board

### **During the Workshop:**

- Serve as point person for on-site decisions during Workshop
- Sign along with the Finance Chair for expenses during the Workshop. It is best to set aside time at the end of the day to go over all daily expenses with the site location representative who is your contact.

### **After the Workshop:**

- Go over financial report with Finance Chair and submit to the Regional Treasurer
- Send 'Thank You's' to those site personnel and others who made life easier during the Workshop
- Plan (as a Workshop expense) a thank you celebration for volunteers, committee members and chairs
- Coordinate with other chairs to compile all workshop materials (ie. Program bulletin, call for presenters, registration forms, etc) & sub-committee reports to be given to the Deputy Director and added to this manual as reference material. The Deputy Director will be the "keeper" of the example from past workshops and updated Regional Workshop Manual.



- Sub-committee reports are whatever you make them, but should include all materials created for the workshop and an evaluation that gathers their thoughts on how the workshop went, words for future workshop committees, changes to the workshop manual etc.

### Helpful Hints

- When estimating the number of attendees, it is better to underestimate than overestimate
- All steering committee and sub-committee members must put everything in writing and keep copies for the best negotiation, combine catering, AV, room needs, and transportation services whenever possible (limit number of items being negotiated separately)
- Meal negotiators need to be aware of the inclusion of service fees and taxes, known as “plus, plus” (++)
- **Make it clear to site staff, steering committee, Regional Board and other service contractors that only Workshop and Finance chairs are authorized to make requests for additional services from service contractors. Both chairs must concur with the request of additional service(s).**
- Stay in constant contact with the steering committee so you know what they are working on; help them problem-solve along the way
- Give out all of your phone numbers including work, home, cellular, etc
- Have bills sent directly to the Finance Chair
- **Generally one would want to be as available as possible for the committee!**

## Program Chair

It is the overall responsibility of the Program Chair to coordinate all events of the workshop. Each segment will be completely organized individually then the segments will be combined into the overall event - jigsaw fashion. You will work closely with the Logistics Chair, who is responsible for coordinating spaces and times with site and audio-visual staff. Program chair and Workshop Chair share the responsibility of coordinating the entire event. Your best quality will be your ability to lead, delegate and coordinate people.

### Position Description

#### General Duties

- Develop a detailed timetable for tasks and track accomplishments of program committee
- Provide Finance Chair with a detailed budget including program expenses and anticipated program income, if any
- Provide Workshop Chair with a list of committee members, agencies, addresses, phone, fax, e-mail, etc
- Keep copies of all correspondence
- Provide a list of volunteer and signage needs to Logistic Chair
- Suggested committees to develop and oversee: Special Events and Exhibit Hall

#### Program Duties for workshop daytime hours (8:00am-5:00pm)

- Develop and distribute a call for presenters
- Identify, invite and confirm keynote speaker(s)
- Solicit sessions from speakers with known excellent presentation skills though a majority of papers that should be volunteered
- Coordinate Program sub-committee to review and select volunteered papers
- Contact potential concurrent speakers to advise of selection or rejection
- Provide a list of keynote speaker(s) and VIP transportation and other special needs to Logistic Chair
- Identify meeting room requirements and make room assignments for presentations and special events (work with Logistics Chair)
- Identify audio-visual requirements and give final list to Logistics Chair
- Coordinate volunteer "room hosts" and "monitors" with Logistics Chair
- If NAI Certification Program and Training Manager offers seminars in conjunction with the workshop, coordinate meeting space, registration, social events with NAI and/or with Certification Program and Training Manager
- Assist Finance Chair in identifying corporate sponsors for program support
- Prepare program descriptions for workshop publications; call for presenters, pre-registration materials, and program bulletin
- Provide Logistics Chair with catering, transportation, and audio-visual needs
- Develop evaluation sheet for concurrent sessions
- It is strongly recommended that an informal leadership session be scheduled that is not concurrent with anything else. (This is separate from the board meeting, the business meeting, and state/province meetings.) This session involves socializing with the

Regional Board and learning how to take-on a leadership role in the region.

- Create ample breaks for registrants to visit exhibitors during workshop

Special Events Duties – often a separate sub-committee—after hours programming (after 5:00pm):

- Coordinate special events with appropriate organizations and facilities
- Identify needs for entertainment and coordinate with Logistics Chair
- Set fees for each event in conjunction with Workshop and Finance Chair
- Explore possibility of getting courtesy passes for local interpretive-related facilities to include in registration packets
- Prepare special event descriptions for workshop publications
- Determine agenda with a step-by-step list of details for each event
- Work with Finance Chair to set times for silent and live auctions

Exhibit Hall Duties—often a separate sub-committee:

- Lay out exhibit area
- Determine maximum and optimum number of exhibitors
- Develop a list of potential exhibitors (start with past exhibitors)
- Determine exhibit fee schedule in conjunction with the Workshop and Finance Chairs (i.e. member, non-member)
- Develop and distribute exhibitor's invitation letter
- Arrange for table skirts, etc through site staff or outside contractor
- Coordinate (possibly with Special Events Chair) a draw to encourage workshop participants to visit exhibitors (scavenger hunt, raffle drawing, etc.)
- Work with Logistics Chair to set exhibit hall hours
- Refine final list of exhibitors names and addresses for inclusion in program bulletin
- Determine needs of each exhibitor (i.e. tables, chairs, electricity, wall space, etc.)
- Contact Regional Treasurer to determine Heartland Region booth needs
- Coordinate breaks to be held in exhibit hall with Logistics Chair
- During Workshop, act as host to exhibitors
- Provide exhibitors with box of supplies held in central location (i.e. tape, Velcro tabs, stapler, wire, etc.)
- Work well advertising exhibit space in registration brochure

### **Helpful Hints**

- All programs and special events should be accessible to people with disabilities; work with Logistics Chair to assure that this happens as a matter of course
- It is impossible to predict popularity of sessions -- understand you're going to miss on some of them, but give it your best shot when assigning rooms
- If room space and time allow, repeat popular sessions if the speaker is willing to do so
- Avoid overcrowding the schedule during general sessions (keep it to announcements and introduction)
- Devise a signal for volunteers to keep speakers on track in terms of time AND MAKE THEM ADHERE TO IT!
- Assign rooms and speakers according to AV needs and keep equipment in the same

room all day (it may keep you from having to rent extra equipment)

- Presenters should come with printed materials ready for distribution. NAI does not pay for reproduction of printed materials.
- Have bills sent directly to the Finance Chair
- Encourage concurrent presenters with hand-outs or PPT presentations to bring a storage device and transfer information to a computer for registrants who want the information, then encourage registrants to bring a storage device themselves or make it available on the internet after the conference. When possible, these will be put on the regional website.

## **Worksheets**

1. Program selection criteria and guidelines for call for presenters
2. Program bulletin inclusions list
3. Sample workshop agenda
4. Concurrent session schedule example
5. Concurrent session evaluation form
6. Room Monitor Instructions
7. Keynote Speaker information form
8. Keynote Speaker Contract
9. Exhibitor information and sample letters
10. Band/Special Events Contract
11. Workshop evaluation form

## **Worksheet #1**

### **Program Selection Criteria**

#### **Guidelines for Call for Presenters**

The following criteria and guidelines are to provide an idea of the types of information that should be included in the Call for Presenters; format can be driven by individual preferences. It is important, however, that selection criteria remain consistent from year to year.

#### **Program Selection Criteria:**

- Originality and creativity of topic, technique
- Potential to attract, stimulate and educate participants
- Relevance to the profession of interpretation, workshop slogan, and proposed topic category
- Clarity of idea, content, presentation method(s)
- Inclusion of hands-on activities, techniques and audience involvement

### **Program Selection Worksheet (optional)**

Session Title:

One a scale of 1-5, 1 being low and 5 being high,

Do you think this will make a good session?

Will the session be stimulating and educational?

Will the presentation be interactive?

Rate the program description.

Answer the following as briefly as possible:

Have you heard of this speaker or know his/her reputation?

Are his/her AV requests or special needs a problem?

Comments:

Please check the option that best fits this session

\_\_\_\_\_ Definitely yes

\_\_\_\_\_ Alternate (on waiting list)

\_\_\_\_\_ Reject

Your Name:

## Guidelines for Call for Presenters:

- Request from each potential presenter:
  - Presentation title
  - Presentation descriptions: one of 40 words for the conference booklet and one of 150 words for the selection committee
  - AV needs and other special needs
  - Time block preference (usually 1 or 2 hours)
  - Topic category and audience level
  - Name of presenter
  - Job title
  - Address
  - Phone, fax, e-mail
  - Same information for co-presenter, if applicable
- Review committee will screen all proposals
- Program committee will notify presenters of status of application **5 months prior to the event.**
- Every effort will be made to schedule accepted presentations in the time block and topic category requested. The committee reserves the right to change the option to suit the overall workshop program, but presenters will be notified of any changes in a timely manner.

## Worksheet #2

### Program Bulletin Inclusions

Program Bulletins should contain at least the following information:

- Letter of welcome from the Regional Director
- Greetings from the workshop chair
- General program information that will help participants navigate the workshop
- General schedule of events: days and times
- Article on local item of natural, cultural, or historical interest
- Brief description of each session
- Advertising to help defray the cost of printing
- List of corporate contributors
- List of exhibitors
- List of steering committee members and their agency or organization
- List of regional officers
- Off-site sessions with short descriptions
- Speaker bibliographies (optional)

## Worksheet #3

### Sample Worksheet Agenda

Day, Date, & Time	Event	Location
Wednesday:		
4:00-6:00pm	Check in & Open Registration	Hotel Lobby
6:30-8:00pm	Social with appetizers	Evening
Thursday:		
7:00-8:00am	Breakfast	Ballroom
7:30-10:30am	Registration Open	Hotel Lobby
8:15-8:45am	Welcome and Orientation	Ballroom
8:45-9:30am	Keynote Speaker (Name)	Ballroom
9:45-12:00pm	Concurrent Session I & II	Concurrent Session
10:00am-5:00pm	Exhibit Hall Open	Ballroom
12:00-1:00pm	Lunch	Ballroom
12:00-6:00pm	Silent Auction Open	Atrium
1:30-2:30pm	Concurrent Session III	Concurrent Session
2:30-2:45pm	Break with Refreshments	Atrium
2:45-3:15pm	State/Province Meetings	Locations
3:15-4:15pm	Heartland Region Business Meeting	Meeting Room
4:15-5:00pm	Open	
5:00-6:00pm	Reception	Atrium
6:00-7:00pm	Dinner	Ballroom
7:00-9:00pm	Keynote Speaker/Entertainment	Ballroom
Friday:		
6:30-8:00am	Breakfast	Ballroom
8:00-11:00am	Registration Open	Hotel Lobby
7:00am-5:00pm	Off-site sessions	Off-site Sessions
5:00-6:00pm	Reception	Atrium

6:00-7:00pm	Dinner	Ballroom
7:00-9:00pm	Live Auction	Ballroom
Saturday:		
7:00-8:00am	Breakfast	Ballroom
8:00-10:30am	Registration Open	Hotel Lobby
8:30-9:30am	Keynote Speaker (Name)	Ballroom
9:45am-12:00pm	Concurrent Session IV & V	Concurrent Session
12:00-1:30pm	Lunch/Next workshop promotion	Ballroom
12:00-6:00pm	Silent Auction Open	Atrium
1:45-2:45pm	Concurrent Session VI	Concurrent Session
2:45-3:00pm	Break with Refreshments	Atrium
3:00-4:00pm	Concurrent Session VII	Concurrent Session
4:00-5:00pm	Open	
5:00-6:00pm	Reception	Atrium
6:00-8:30pm	Dinner, Awards, State of the Region	Ballroom
8:30-11:00pm	Entertainment	Ballroom
Sunday:		
7:00-8:00am	Breakfast	Ballroom
8:00am	Departures	



## Worksheet #4

### Concurrent Session Schedule Examples

THURSDAY

<b>Concurrent Session I</b>  <b>(9:45-10:45am)</b>	Room #1	Program Title Speaker Speaker's Title Organization	Room #2	Program Title Speaker Name Speaker's Title Organization	Room #3	Program Title Speaker Name Speaker's Title Organization
	Program Description		Program Description		Program Description	

OR

THURSDAY

Concurrent Sessions	Room #1	Room #2	Room #3
9:45am-10:45am	Title Speaker	Title Speaker	Title Speaker
11:00am- 12:00pm	Title Speaker	Title Speaker	Title Speaker
1:30pm-2:30pm	Title Speaker	Title Speaker	Title Speaker

Session Descriptions

9:45am-10:45am

Room #1 Title, Speaker, Description

Room #2 Title, Speaker, Description

Room #3 Title, Speaker, Description

## Worksheet #5

### Concurrent Session Evaluation

Title:                      Presenter(s):

Please rate this session on the following criteria on a scale from 1 to 5, 1 being the lowest and 5 being the highest.

Did the session match the description in the Program Guide?

1   2   3   4   5

Was/were the presenter(s) organized and prepared?

1   2   3   4   5

Was/were the presenter(s) an effective speaker?

1   2   3   4   5

Were the handouts useful to you?

1   2   3   4   5

Were the AV presentations effective?

1   2   3   4   5

Please rate this session overall.

1   2   3   4   5

Comments:

## Worksheet #6

### Room Monitor Instructions

These instructions should be placed in a manila envelope and labelled for the room monitor, which stays in the room after each presentation. Decide how evaluations will get to the Program Chair for review and place that as the last step at the end of the session.

Thank you so much for volunteering to be a room monitor! Everyone involved in the NAI Region 5 Workshop appreciates your assistance so much. Below is some information you need.

- Each presentation room is equipped with \_\_\_\_\_. Do not remove these items from the meeting room or let anyone else do so.
- Let the workshop's IT/AV specialist know if you are having any problems or run short on materials. They can be contacted by \_\_\_\_\_.
- No tape or tacks on walls

#### Before the start of the session

- Verify that AV equipment is working. If there are any problems, contact the IT/AV person by \_\_\_\_\_.
- Introduce yourself to the presenter and confirm presenter's name, position, and the title of presentation. (Some presenters will prefer to introduce themselves.)
- Find out if the presenter will need assistance in passing out handouts, adjusting lights, etc.
- Distribute an evaluation form to each person as they enter.
- If the room is full, post the Session Full sign; do not allow more people into the room due to fire code. (Signs are located in the manila envelope.)

#### Start of session

- Sessions should begin promptly at assigned time. Do not wait for stragglers.
- Close door at the beginning of session
- Ask people to be seated, announce that you'll collect evaluations at the end of the end of the session and introduce the presenter
- Before you introduce presenter, find out if they have a written bio. This is informal, make it short and sweet

#### During the session

- Assist with lights, handouts and AV as needed
- The following should be included in your manila envelope
  - sign for door: session full
  - signs to hold up for speaker: 10 minutes/ 5 minutes /1 minute
- Notify presenter when 10, 5 and 1 minutes are left in session, using the cue cards provided.

#### End of session

- Ensure that the room is cleared as soon as possible for the next presenter

- Assist with clean-up to make sure the room is set up as it was before your session began.
- Take items left behind to lost and found at the registration table
- *Instructions on what to do with collected evaluations. One suggestion is to include leave the sealed envelopes in a box at the back of the room, to be collected at the end of each day.*

## Worksheet #7

### Keynote Speaker Information Form

National Association for Interpretation  
Heartland Region Workshop  
March -5, 20XX

**Name:** Nancy B Handy

**Organization:** National Park Service

**Title:** Chief of Interpretation and Resource Management

**Address:** Great Midwest National Park, Star Route 3 Box AA, Genoa, IA 44455

**Phone:** (333) 444-5555

**Fax:** (333) 444-5556

**E-mail:** do.da@yadda\_hey.com

**Title of Presentation:** Innovative Interpretive Techniques in Living History

**A-V Needs:** Laptop and Projector

**Presentation Description:** (Insert description here)

**Biographical Information:** Nancy began her interpretive career in Michigan where she was raised. She worked seasonally for Great Michigan Tour Boat and Cruises, giving interpretive boat tours of the Great Lakes. She graduated from the University of Montana and was hired permanently by NPS for interpretive positions at Grand Canyon, Indiana Dunes National Recreation Site and Organ Pipe Cactus National Monument in Arizona, where she spearheaded interpretive programs based on leaf cutter ant research that was taking place in the Monument and just across the border in Mexico. Nancy became interested in cultural history when she was transferred to Great Midwest National Park in 1990 and was faced with interpreting turn of the century artifacts. She has devised innovative techniques that work well with large or small audiences, adults or children, as personal or non-personal interpretive services and as long or short programs.

## Worksheet #8

### Keynote Speaker Contract Template

Featured Speaker Contract  
National Association for Interpretation  
Region 5 Workshop  
CITY, STATE  
MONTH DAY, YEAR

Thank you for agreeing to serve as a featured speaker for the NAI Region 5 Workshop in CITY, STATE during the week of MONTH DAY, YEAR.

**Contract.** This contractual agreement is between the National Association for Interpretation Region 5, hereinafter known as NAI Region 5, and the presenter hereinafter known as “speaker” or “presenter” listed below:

**Name:**

**Address:**

**Telephone:**

**Email:**

**Presentation Date/Time.** It is anticipated that approximately NUMBER individuals will attend the presentation, which is currently scheduled for MONTH DAY, YEAR at XXX a.m. at the LOCATION in CITY, STATE. Please note that the workshop schedule is being developed and therefore is subject to change, but presenter will be notified of any changes that might affect his presentation. At this time, none is anticipated.

**Speaker Will Provide.** The speaker agrees to arrive at the LOCATION at such a time so that an AV check can be done at least one hour before the scheduled presentation.

- Signed contract and completed W9 form no later than DATE
- cover all costs for travel and meals not specifically included in this proposal, and other associated expenses
- make own travel arrangements
- provide a XXX -minute keynote address based on TOPIC
- provide a photo and short biography
- In addition, presenter must provide the following information before this contract is considered in effect:
  - **Title of program:**
  - **30-word abstract (for use in promotional publications):**
  - **250-word abstract/bio (for use in workshop program guide and other publications as workshop promotion):**

**NAI Will Provide.** NAI will:

- provide an honorarium of \$ **AMOUNT**, payable immediately following the presentation
- provide **XXX** for travel
- provide breakfast and lunch with workshop participants on the day of the presentation
- schedule a book signing for the speaker in the exhibit hall immediately following the keynote address (if applicable)
- promote the presentation through workshop publicity
- Audio-visual equipment to be provided by NAI includes microphone, PA system, LCD projector, laptop computer, and easel. Additional A/V equipment will need to be provided by the speaker.

Speaker Initials \_\_\_\_\_

Page 1 of 2

**Honorarium.** Speaker will receive an honorarium of \$ **AMOUNT** payable immediately following his presentation. All costs for travel, meals not specifically included in this contract, and other associated expenses are to be paid by the speaker. Speaker will make his own arrangements for travel. NAI assumes no obligation either directly or implied for such costs.

**Waiver or Modification.** The waiver of a breach of any of the terms of this Agreement or any default of the Agreement shall not be deemed a waiver of any subsequent breach or default, whether of the same or similar nature, and shall not in any way affect the other terms of this Agreement. No waiver or modification shall be valid or binding unless in writing and signed by the parties.

**Conditions and Cancellation.** If speaker cancels or fails to appear, costs associated with the speaker's presentation may be charged to speaker by NAI Region 5 and no payment to speaker will be made. If the speaker's presentation is cancelled by NAI Region 5 due to acts of God or other events beyond NAI's control, NAI will pay direct costs associated with the cancellation but will not pay the full speaker honorarium. Conditions of this contractual agreement may be altered or changed only with the written approval of NAI Region 5's Illinois 2014 Workshop Finance Chair and the speaker.

## Signatures

_____ / _____	_____ / _____
<b><u>Speaker</u></b>	Date
	NAI Region 5 2014
	Workshop Finance Chair
	Name
	Address
	City, State Zip
	E-mail
	Phone

**NOTE.** Please complete and sign both copies of this contract in the envelope provided. Initial each page, please. A signed and fully executed copy will be sent to the speaker.

Questions regarding this contract or speaking engagement should be directed to:

NAI Region 5 Illinois 2014 Workshop Program Chair

Name

Address

Email

Phone number

Speaker Initials \_\_\_\_\_

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## **Worksheet #9**

### **Exhibitor's Information and Sample Letters**

Include with the exhibitor invitation:

- Directions on how to get to the workshop site
- Map of location, showing location of exhibit hall
- Number of booths available to exhibitors
- Booth rates (member and non-member)
- Time and days for setup and tear-down
- Application form



## Letter of Invitation

Date

Contact's Name

Organization

Address

City, State, Zip

We would like to invite you to be an exhibitor at the National Association for Interpretation's (NAI) Heartland Region Workshop. NAI is holding a regional workshop in \_\_\_\_\_ at the \_\_\_\_\_ on **month, dates, year**. This year's regional workshop slogan is: \_\_\_\_\_.

The mission of NAI is to achieve and maintain excellence in sharing of natural, cultural and historical interpretation. Over 100 interpreters from the Upper Midwest (North and South Dakota, Illinois, Iowa, Minnesota, Nebraska, Wisconsin, and Manitoba) are expected to attend. Membership includes naturalists, cultural and historical interpreters, university faculty, environmental education specialists, conservation organization members and classroom teachers.

NAI would like to make high quality environmental products, teaching resources and services available to participants as part of a successful workshop. Exhibits will be on display on **Day, Month Date from \_\_\_\_\_ a.m. – \_\_\_\_\_ p.m.** The exhibit hall will be located inside the main ballroom of the conference center. Exhibit booth space charge will be \$\_\_\_ **for members** and \$ \_\_\_ **for non-members**. This includes a 10' table with skirting/covering, lunch for one, and ¼ page ad in the workshop program guide.

There will be a buffet lunch at which the workshop participants will have the opportunity to visit with the exhibitors. Following the lunch, the exhibit hall will be the main focus of the workshop for two hours, thus all participants will be able to interact with the exhibitors. We will recognize all exhibitors in our program guide and website.

We would like to thank you for your time and look forward to hearing from you. Please contact me if you have any questions.

Sincerely,

Name of Chair

Chair Title

20XX NAI Heartland Region

E-mail

Phone #

## Sample Exhibitor Information Form

NAI Heartland Region Workshop

Date

I appreciate the opportunity to further the interpretive profession by participating as an exhibitor at the National Association for Interpretation Heartland Region Workshop in

\_\_\_\_\_

Company or Organization: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Telephone: \_\_\_\_\_ E-mail: \_\_\_\_\_

Name of Exhibitors (For Name Tags): \_\_\_\_\_

Check appropriate box: \_\_\_\_\_ Member Fee (\$XX) \_\_\_\_\_ Non-member Fee (\$XX)

Exhibitor Space includes:

- 10 ft table with skirting and cover
- Lunch for one person
- ¼ page ad in the workshop program guide

If you are in need of additional space or electricity, please contact \_\_\_\_\_ for pricing and assistance.

Please make checks payable to NAI Heartland Region.

Please send this form and payment to:

Contact Name (Usually Financial Chair or Regional Treasurer)

Address

E-mail

Phone

Confirmation Letter

Date

Name

Organization

Address

City, State, Zip

## **Sample Exhibitor Confirmation Letter**

Salutation:

Thank you for agreeing to exhibit at the NAI Workshop in (month). We are looking forward to having you join us and we appreciate your support.

Because of organizations like yours, we expect to hold a very informative and productive workshop. You'll receive another letter (approximate date) with more detailed information. If you have any questions between then and now, call me at (phone number). Your receipt is enclosed.

Thank you again and see you at the workshop.

Sincerely,

Name

Chair/Committee

Contact Info

## Exhibitor Letter to Those Who Did Not Respond to Initial Letter

Date

Name

Organization

Address

City, State, Zip

Dear (Title/Last Name)

This is your last chance to participate as an exhibitor at the NAI Heartland Region Workshop. There are X exhibit spaces left, but you must act now to reserve one of them. The workshop program goes to press on (date) and only confirmed exhibitors will be listed in the program. The remaining exhibit spaces must be filled first-come-first-served. If you have not yet confirmed, but still wish to exhibit, you must call or fax me a confirmation by (time and date).

NAI is holding a regional workshop in (name of town) at the (name of facility) from (dates). The mission of NAI is to achieve and maintain excellence in sharing of natural, cultural and historical interpretation. Over 100 interpreters from the Upper Midwest (North and South Dakota, Illinois, Iowa, Minnesota, Nebraska, and Wisconsin and Manitoba) are expected to attend. Membership includes naturalists, cultural and historical interpreters, university faculty, environmental education specialists, conservation organization members and classroom teachers; your exhibit will reach a diverse professional audience.

NAI needs to make high quality environmental products, teaching resources and services available to workshop participants as part of a successful conference. Exhibits will be on display in (location) from (time and dates). There will also be (X) special hours set aside (list hours). No sessions or workshops will be scheduled during these times so that all participants will be able to interact with the exhibitors. Naturally we will recognize all exhibitors in our conference package.

Please complete the enclosed form and return to:

Name of Chair

Address

City, State, Zip

Phone/Fax/E-mail

From the NAI workshop committees, thank you for your time. Please contact me if you have any questions.

Sincerely,

Name

Chair/Committee

## Sample Thank You Letter

Date

Name

Organization

Address

City, State, Zip

Dear XXX,

On behalf of the 20XX NAI Heartland Region Workshop committee, we would like to thank you for taking time out of your busy schedule to be an exhibitor in (location) on (date). We greatly appreciate you sharing your talents and expertise with our workshop participants. All of the participants were quite impressed and enjoyed meeting and making connections with you. We also want to thank you for your generous sponsorship toward the workshop. This helped immensely.

We would like to invite you to the 20XX NAI Heartland Region Workshop in (location) from (dates) at the (name of site/center). If you are interested in being an exhibitor for this workshop, please contact \_\_\_\_\_ by calling \_\_\_\_\_.

Once again, thank you for braving the (location) weather and being an exhibitor and sponsor at this year's NAI Heartland Region Workshop. We hope to work with you again soon.

Sincerely,

Name

Chair/Committee

Contact Information

## Worksheet #10

### Band Contract

**Special Event Contract**  
**National Association for Interpretation**  
**Region 5 Workshop**  
**City, State**  
**Dates**

Thank you for playing for the NAI WORKSHOP in CITY, STATE during the week of MONTH DAY, YEAR. It is anticipated that approximately NUMBER individuals will attend the banquet and dance, which is scheduled for Saturday April 5th, from XXX pm to XXX pm in the ROOM at the LOCATION. Please note that the schedule is subject to change, but you will be notified of any changes that might affect your performance.

This contractual agreement is between the National Association for Interpretation Region 5, hereinafter known as NAI Region 5, and the below listed individual, hereinafter known as the band.

**BAND NAME**

**c/o CONTACT NAME**

**Email:**

**Mailing Address:**

**CITY, STATE ZIP**

**Phone Number:**

**Fax:**

The band agrees to provide the following services:

Signed contract and completed W9 form no later than DATE

The band will provide XXX hours of dance music (including breaks) following the awards banquet, from approximately XXX pm-XXX pm.

BAND NAME will receive payment of **\$AMOUNT** payable immediately following the dance. All costs associated with travel, lodging, meals, and other associated expenses are to be paid by the band. The band will make their own arrangements for travel and lodging. NAI Region 5 assumes no obligation either directly or implied for such costs. If the band (or any assistants) *National Association for Interpretation- Heartland Region Workshop Manual 2013*

intend to attend the NAI Region 5 WORKSHOP as a participant, they will be required to register for the workshop. There is no charge or registration required for Presenters (or assistants) who attend the NAI Region 5 WORKSHOP only to deliver their presentation or performance.

A sound system will be provided by the band. If the band cancels or fails to appear, costs associated with the dance may be charged to the band by NAI Region 5 and no payment to the band will be made. If the dance is cancelled by NAI Region 5 by acts of God or other unforeseen circumstances, NAI Region 5 will pay direct costs associated with the cancellation but will not pay the full band's payment.

**Audiovisual equipment to be provided by the band:** all sound

**Audiovisual equipment to be provided by NAI Region 5 :** none

Conditions of this contractual agreement may be altered or changed only with the written approval of NAI Region 5 YEAR Finance Chair and the band.

_____ CONTACT for <u>The BAND NAME</u>	_____ Date	_____ Finance Chair Name Address City, State Zip Phone E-mail	_____ Date
--	---------------	---	---------------

Please complete and sign both copies. Return both in the envelope provided and a signed and fully executed copy will be sent to the band.

Questions regarding this contract or the engagement should be directed to:

NAI Region 5 YEAR Workshop Program Chair OR Special Events Chair  
Name  
Address  
City, State Zip Code  
Phone  
E-mail

## Worksheet #11

### Workshop Evaluation (work with DD on sending this out)

<b>1. What were the most important factors that motivated you to attend this workshop? (Check all that apply)</b>
Professional Development
To make a Presentations
Opportunity to Network
To Exhibit Materials
Keynote Speakers
Off-site Sessions
Other
<b>Total</b>

<b>2. Have you attended a Region 5 workshop before?</b>
Yes
No
No Responses
<b>Total</b>

<b>3. I found the workshop to be well organized and efficiently run.</b>
Strongly Agree
Agree
Neutral
Disagree
Strongly Disagree
No Responses
<b>Total</b>

<b>4. I found the workshop to be professionally and/or personally useful.</b>
Strongly Agree
Agree
Neutral
Disagree
Strongly Disagree
No Responses
<b>Total</b>

<b>5. I found the cost of the workshop to be reasonable and good value.</b>
Strongly Agree
Agree
Neutral
Disagree
Strongly Disagree
No Responses
<b>Total</b>



**6. Registration materials were clear and easy to understand.**

Strongly Agree

Agree

Neutral

Disagree

Strongly Disagree

No Responses

**Total**

**7. What information did you find most helpful during registration?**

**8. Any comments or suggestions on how to improve the registration process?**

**9. The workshop facilities were conducive to learning.**

Strongly Agree

Agree

Neutral

Disagree

Strongly Disagree

No Responses

**Total**

**10. The workshop accommodations were clean and comfortable.**

Strongly Agree

Agree

Neutral

Disagree

Strongly Disagree

No Responses

**Total**

**11. The food was nutritious, appealing and plentiful.**

Strongly Agree

Agree

Neutral

Disagree

Strongly Disagree

No Responses

**Total**

**12. The aspect(s) of the accommodations I liked best were ...**

**13. There was a good variety of presentations during every block of concurrent sessions.**

Strongly Agree

Agree

Neutral
Disagree
Strongly Disagree
No Responses
<b>Total</b>

**14. The following concurrent session(s) were most relevant to my job/professional development/career.**

**15. I found the following concurrent session presenters interesting, appropriate, and/or enjoyable.**

**16. What concurrent session would you like to see offered in the future? (Please include contact info if possible)**

**17. I found sufficient time to peruse the exhibit hall.**

Strongly Agree
Agree
Neutral
Disagree
Strongly Disagree
No Responses
<b>Total</b>

**18. I found there to be a diversity in the number and types of exhibitors.**

Strongly Agree
Agree
Neutral
Disagree
Strongly Disagree
No Responses
<b>Total</b>

**19. What exhibits/exhibitors would you like to see in the future? (Please include contact info if possible)**

**20. I found the keynotes to be interesting, appropriate, and enjoyable.**

Strongly Agree
Agree
Neutral
Disagree
Strongly Disagree
No Responses
<b>Total</b>

**21. The following keynote speaker(s) were most relevant to my job/professional development/career.**

**22. What keynotes would you like to see in the future? (Please include contact info if possible)**

**23. Which Off-site Session did you attend?**

#1 The Accessible Backcountry

#2 The Power of Water

#3 Interpretation in the City

#4 Magnificent Marshes

#5 Rocks, Trees, Water

No Responses

**Total**

**24. Overall, what was your impression of the session?**

**25. The information presented in this off-site session met or exceeded my expectations.**

Strongly Agree

Agree

Neutral

Disagree

Strongly Disagree

No Responses

**Total**

**26. Enough time was scheduled for each presentation and/or stop on the session.**

Strongly Agree

Agree

Neutral

Disagree

Strongly Disagree

No Responses

**Total**

**27. The speakers communication style kept me focused and interested.**

Strongly Agree

Agree

Neutral

Disagree

Strongly Disagree

No Responses

**Total**

**28. I learned new information about the topics presented.**

Strongly Agree

Agree

Neutral

Disagree

Strongly Disagree

No Responses

**Total**

**29. This off-site session gave me skills or perspectives that may be useful to me in my own work.**

Strongly Agree

Agree

Neutral

Disagree

Strongly Agree

No Responses

**Total**

**30. This participant's basic needs (food, water, restrooms, etc) were property met on this session.**

Strongly Agree

Agree

Neutral

Disagree

Strongly Disagree

No Responses

**Total**

**31. Transportation was adequate and efficient.**

Strongly Agree

Agree

Neutral

Disagree

Strongly Disagree

No Responses

**Total**

**32. What specific information presented during the field trip was of greatest value to you?**

**33. What specific subject areas or site types would you suggest for future off-site sessions tracks?**

**34. Any information you would like to pass onto the off-site session leader(s)?**

**35. Please share your favorite aspect(s) of the workshop.**

**36. What would be one change you would make to the workshop and why?**

**37. In what ways will you use the information presented at this workshop?**

**38. I feel I need more training or information on the following subject(s).**

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**39. Future workshop coordinators would like to address your needs and the needs of interpretation. In your opinion, what are some of the challenges facing the profession of interpretation?**

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**40. Any general comments and suggestions regarding the workshop?**

---

## Finance Chair

The Workshop is the major fundraiser for the region. Many of our annual expenses are dependent on the amount of money made at the Workshop. There is a sample budget included with this section of the manual, but is it your job to make it fit the parameters of your particular Workshop. You will be charged with the responsibility of coordinating financial procedures and will work closely with the Regional Treasurer to keep the workshop accounts in order. You will also work with the Registration Chair when that person starts getting the big bucks. Basically, you'll have your hands in everything that has to do with money at the Workshop.

### Position Description

- Develop detailed timetable for tasks and track accomplishments of committee
- Provide Workshop Chair with list of committee members, agencies, addresses, phone, fax and e-mail
- Keep copies of all correspondences
- Provide list of on-site volunteers needed to Logistics Chair
- Establish overall budget with input from steering committee and present to Regional Board
- Track expenses and income before, during, and after Workshop with Regional Treasurer
  - **Keep a list of expenses that are due before, during, and after the workshop and coordinate with the Regional Treasurer**
  - Payments needed during the workshop (i.e. band and keynotes) should be requested a minimum of a month in advance to account for processing and mailing.
- Update steering committee as budget changes occur
- Obtain from steering committee all bills, checks, receipts; retain copies and forward originals to Treasurer for payment weekly.
- Oversee on-site financial transactions, especially fundraising and auctions
- Revise budget as estimated costs become real and submit an updated budget to the Regional Board 6-10 months before Workshop
- Supply all on-site and off-site facilities and service providers who will be billing NAI with a copy of NAI's non-profit organization status information, which can be obtained at [www.interpnet.com](http://www.interpnet.com) (Home > Resources > NAI Administrative Documents > Manuals and Policy).
- Allocate 5%-10% of total budget as a contingency fund
- Solicit financial support (sponsorships, etc.) from local corporations, businesses, agencies and organizations
- Provide the Regional Treasurer and Workshop Chair with the final accounting within 30 days following the Workshop.

### Helpful Hints

- Complimentary rooms or services will be obtained from the meeting sites as a matter of negotiation; however; certain items have been identified as standard comps while others should never be comped; budget for the following:
  - Always comped or paid for services
    - Registration for Regional scholarship recipients

- Keynote speaker fees (at least the offer is made to keynotes, sometimes they donate it back to NAI or are unable to accept since they are agency people on company time)
- Sometimes permitted costs
  - Committee members optional registration reduction refund of no more than 15% when financially prudent and approved by the Regional Treasurer. The reduction must be off of the profit portion of the registration fee and not go into hard costs.
- Never comped or paid for services
  - Concurrent session speakers (volunteered or solicited)
- Remember to factor in revenue items
- Create signage for appropriate levels of sponsorship and have them acknowledged at the appropriate time
- Taxes and gratuity will vary from location to location and can add as much as 24% to meal functions
- Set registration fees in line with previous year's fees so participants know what to expect from year to year
  - Traditionally the registration fee has covered everything during the workshop, including meals, special events, and off-site sessions
- All income and expenditures associated with the workshop must be accounted for on paper through original receipts and invoices.
- The reimbursement form can be found at [www.interpnet.com](http://www.interpnet.com) (Home > Resources > NAI Administrative Documents > Manuals and Policy)
  - The form needs to be filled out by the person who 'purchased the goods' and a copy of the receipt needs to be submitted with the completed form to our Regional Treasurer within 30 days of accruing the cost.
- **Purchases that exceed a committee's budget limit are not permitted without prior approval of the chairs on a case by case basis. Any additional expenditure that impacts a board approved budget need board approval.**

## Worksheets

1. Sample budget
2. Sample registration breakdown with student, non-member, etc
3. Sample sponsorship letters and levels
4. How to Run an Auction
5. Sample Auction Forms

## Worksheet #1

### Sample Budget

The budget is required to contain a column with 85 participants that results in a profit of a minimum of \$4,000. Other columns may be made with participant numbers above and/or below that participant number. Each workshop is unique and will have higher or lower budget numbers. Check with Regional Treasurer for current credit card fees.

Revenues		per person	85 participants	125 participants	175 participants
	Registration Fees (\$250/person)	\$ 250.00	\$ 21,250.00	\$31,250.00	\$ 43,750.00
	Sponsorships		\$ 2,000.00	\$ 2,000.00	\$ 2,000.00
	In-Kind donations		\$ 1,000.00	\$ 1,000.00	\$ 1,000.00
	Fundraising at workshop		\$ 350.00	\$ 350.00	\$ 350.00
	Exhibitors (10@ \$75)		\$ 750.00	\$ 750.00	\$ 750.00
	State Baskets		\$ 400.00	\$ 400.00	\$ 400.00
	Auction		\$ 4,000.00	\$ 4,000.00	\$ 4,000.00
	Off-Site Admission/Speaker Comps	\$ 12.00	\$ 1,020.00	\$ 1,500.00	\$ 2,100.00
	Transportation in-kind donations	\$50/van	\$ 450.00	\$ 1,150.00	\$ 1,500.00
	Total		\$ 31,220.00	\$42,400.00	\$ 55,850.00

Expenses		per person			
	Welcome Bags/Giveaways	\$ 10.00	\$ 850.00	\$1,250.00	\$ 1,750.00
	Meals	\$ 140.00	\$ 1,900.00	\$17,500.00	\$ 24,500.00
	Snacks	\$ 44.00	\$ 3,740.00	\$ 5,500.00	\$ 7,700.00
	Entertainment		\$ 2,500.00	\$ 2,500.00	\$ 2,500.00
	Speakers		\$ 1,200.00	\$ 1,200.00	\$ 1,200.00
	Credit Card Fees (80% of reg x 5%)		\$ 850.00	\$ 1,250.00	\$ 1,750.00
	Beverage Service (Wed & Fri)		\$ 2,000.00	\$ 2,000.00	\$ 2,000.00
	Office Supplies		\$ 200.00	\$ 200.00	\$ 200.00
	Printing		\$ 400.00	\$ 400.00	\$ 400.00
	Nametags		\$ 600.00	\$ 600.00	\$ 600.00
	Off-Site Sessions admissions	\$ 15.00	\$ 1,275.00	\$1,875.00	\$ 2,625.00
	Advertisement		\$ 200.00	\$ 200.00	\$ 200.00
	Event Signage		\$ 200.00	\$ 200.00	\$ 200.00
	Transportation - Off-Site Sessions	\$50/van	\$ 450.00	\$ 1,150.00	\$ 1,500.00
	Committee Gift		\$ 350.00	\$ 350.00	\$ 350.00
	Total		\$ 26,715.00	\$36,175.00	\$47,475.00

<b>Heartland Region Revenue Goal</b>		<b>\$ 4,505.00</b>	<b>\$ 6,225.00</b>	<b>\$ 8,375.00</b>
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## Worksheet #2

### Sample Registration Breakdown

		Nebraska 2013	Manitoba 2011	Wisconsin 2010
<b>Early - Full</b>	Member - Reg	250	160	240
	Member - Student	200	120	190
	Non-mbr - Reg	320	195	275
	Non-mbr - Student	225	155	210
	Guest Saturday Banquet	35		
	Guest		120	140
<b>Early - One</b>	Member - Reg	125	80	120
	Member - Student	100	60	95
	Non-mbr - Reg	160	110	130
	Non-mbr - Student	115	90	115
	Guest Saturday Banquet	35	35	35
	Guest- Fri		65	65
<b>Reg- Full</b>	Member - Reg	290	200	280
	Member - Student	240	150	230
	Non-mbr - Reg	360	235	315
	Non-mbr - Student	265	180	250
	Guest Saturday Banquet	50	145	155
<b>Reg - One</b>	Member - Reg	145	100	140
	Member - Student	120	75	115
	Non-mbr - Reg	180	135	175
	Non-mbr - Student	135	105	135
	Guest Saturday Banquet	50	50	50
	Guest- Fri		85	80
<b>Onsite - Full</b>	Member - Reg	330	250	300
	Member - Student	280	200	250
	Non-mbr - Reg	400	285	405
	Non-mbr - Student	305	230	335
	Guest Saturday Banquet	50		
	Guest		195	170
<b>Onsite - One</b>	Member - Reg	165	125	150
	Member - Student	140	100	125
	Non-mbr - Reg	200	160	185
	Non-mbr - Student	155	130	145
	Guest Saturday Banquet	50	70	65
	Guest- Fri		105	95

Non-membership registration must include the cost of an individual NAI membership for one year.

## Worksheet #3

### Sample Sponsorship Invitation Letter

Date \_\_\_\_\_

Dear \_\_\_\_\_,

We would like to invite you to be a sponsor at the National Association of Interpretation's (NAI) Heartland Region Workshop. NAI is holding a regional workshop in (location) at the (site) from (dates). This year's regional workshop slogan is (slogan)

NAI is a non-profit professional organization dedicated to advancing the profession of heritage interpretation. Our regional membership includes those who work at parks, museums, nature centers, zoos, botanical gardens, aquariums and other similar organizations. Our region includes Minnesota, Wisconsin, North Dakota, South Dakota, Iowa, Nebraska, Illinois and the Canadian provinces of Manitoba and Nunavut. Over 150 interpreters from the Upper Midwest are expected to attend.

NAI's mission is to inspire leadership and excellence to advance heritage interpretation as a profession. To that end our annual regional workshops are often a primary professional development and networking opportunity where our members can share, improve and expand their skills in providing interpretative services to their respective audiences. A key to delivering this service to our members is offering reasonably priced workshops. This is where your organization can help us.

The workshop consists of concurrent sessions presented by the membership, off-site sessions, keynote and guest speakers and evening events. Workshop attendees also dine together at several meals and network during special events and with exhibitors during breaks. Your financial sponsorship will help keep costs low so more of our membership can attend and benefit from the quality learning experience the workshop provides.

You benefit from supporting the NAI Heartland Region Interpreters workshop in several ways. First, you benefit directly from the positive acknowledgment, recognition and exposure you will receive before, during and following the workshop. Your constituency will be the beneficiary of quality interpretive services whenever they visit a zoo, museum, park or nature center where one of our members works. And you help strengthen the quality of educational opportunities in outdoor experiences throughout the region.

I invite you to recognize and show your appreciation for the good work interpreters are doing across the region in support of outdoor education by joining us as a Sponsor. Your sponsorship will go far to defray the fixed costs associated with a workshop of up to 150 attendees. Depending on the sponsorship level you choose, your organization will receive workshop premiums. A list of sponsorship levels is enclosed.

We would like to thank you for your time and look forward to hearing from you by (date).  
Please contact me if you have any questions.

Sincerely,

Name

Chair

Contact information

## **Sample Sponsorship Levels**

### **Flower Sponsorship Level**

\$50 to \$99 - 20 spaces available

- Program bulletin acknowledgment.
- Daily announcement board acknowledgment on Thursday.
- Acknowledgment in promotional materials if sponsorship received by (date)
- We will display your brochures at our registration desk during workshop.

### **Tree Sponsorship Level**

\$100 to \$249- 10 spaces available

- Program bulletin acknowledgment.
- Daily announcement board acknowledgment on Thursday and Saturday.
- Acknowledgment in promotional materials if sponsorship received by (date).
- We will display your brochures at our registration desk during workshop.

### **Fish Sponsorship Level**

\$250 to \$499 -8Keynote Speaker spaces available

- Program bulletin acknowledgment.
- Table top tent card acknowledgment of your sponsorship during meals.
- Daily announcement board acknowledgment on Thursday and Saturday.
- Acknowledgment in promotional materials if sponsorship received by (date).
- Lunch for one on either Thursday or Saturday.
- We will display your brochures at our registration desk during workshop.

### **Deer Sponsorship Level**

\$500 to \$749- 6 offsite session sponsorships available

- Program bulletin, banner and daily announcement board acknowledgment.
- Table top tent card acknowledgment of your sponsorship during auction dinner.
- Acknowledgment in promotional materials if sponsorship received by (date).
- Verbally acknowledged as an off-site session sponsor during off-site session and at auction dinner.
- Acknowledgment on NAI Heartland Region website up to workshop including a link to your website.
- One space during off-site session of choice..
- We will display your brochures at our registration desk during workshop.

### **Eagle Level Sponsorship**

\$750 to \$999- 3Evening event sponsorship

- Program bulletin, banner and daily announcement board acknowledgment.
- Table top tent card acknowledgment of your sponsorship during the evening event of your choice. (Choices)
- Acknowledgment in promotional materials if sponsorship received by (date).
- Verbally acknowledged as an evening event sponsor during said activity.
- Acknowledgment on NAI Heartland Region website up to workshop including a link to your website.
- Dinner for one during the special event.
- An individual membership to NAI.
- We will display your brochures at our registration desk during workshop

### **Bear Level Sponsorship**

\$1000 and above - 3 sponsorships available

(only one sponsorship available for the Awards Banquet)

- Program bulletin, banner and daily announcement board acknowledgment.
- Table top tent card acknowledgment of your sponsorship during lunch the day of your sponsored breaks. (Thursday or Saturday)
- Acknowledgment of your sponsorship on materials posted at break tables on the day of your sponsored breaks.
- Verbal acknowledgment 3 times the day of your sponsored breaks
- Acknowledgment in promotional materials if sponsorship received by (date).
- Acknowledgment on NAI Heartland Region website up to workshop including a link to your website.
- Exhibit booth space available during exhibit hall hours on Thursday.
- Full registration with all meals for one person.
- An individual membership to NAI
- We will display your brochures at our registration desk during workshop.

## Sample Sponsorship Form

NAI Heartland Region Workshop

Date \_\_\_\_\_

I appreciate the opportunity to further the interpretive profession by participating as an exhibitor at the National Association for Interpretation Heartland Region Workshop in

\_\_\_\_\_

Company or Organization: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Telephone: \_\_\_\_\_ E-mail: \_\_\_\_\_

I will be the following sponsor:

\_\_\_\_\_ Bear level sponsorship - \$1000 and above

\_\_\_\_\_ Eagle level sponsorship - \$750 - \$999

\_\_\_\_\_ Deer level sponsorship - \$500 - \$749

\_\_\_\_\_ Fish level sponsorship - \$250 - \$499

\_\_\_\_\_ Tree level sponsorship - \$100 - \$249

\_\_\_\_\_ Flower level sponsorship - \$50 - \$99

Please make checks payable to NAI Heartland Region.

Please send this form and payment to:

Contact Name

Address

E-mail

Phone

## Worksheet #4

### How to Run an Auction

Both silent and live auctions are run during the workshop, with higher priced items going on live auction. We also have a raffle for state baskets and state/province penny wars.

#### Things to do before the Auction

- Work with Promotional and Registration Chairs to ensure that workshop promotional and registration items solicit the following:
  - Live auction donations
  - silent auction donations
  - state/province baskets
- Solicit a volunteer auctioneer. (Choose from the talents of attending NAI Region 5 members.) You may choose more than one auctioneer.
- Contact the Region 5 Scholarship chair to discuss volunteers, logistics, and how their recipients can assist at the auction
  - Contact additional volunteers if needed
- Work with Registration Chair to confirm that a checkbox be provided on the registration form for people to commit to bringing an item for the auction. Also, remind about auction items on confirmation letter
- Check office supplies for any leftover raffle tickets for state baskets. Purchase more if needed.
- Arrange for on-site logistical needs
- Solicit sponsors for refreshments.
- Print silent auction bid sheets
- Prepare announcements regarding auction
- Make sure winners of silent auction items are posted outside auction room or in registration area or announced so winners pay for and pick-up items work
- Solicit items from exhibitors
- Decide when auctions and penny wars are going to take place during the workshop
  - Typically, the live auctions takes place on Friday evening.

#### On-Site Logistical Needs

- Work with Registration Chair to get volunteers for auction item check-in to help registrants sign-in auction items (or use your own committee members)
- Locate storage place for auction items
- Assign location for silent auction
- Have tables for silent auction items in exhibit hall, or other suitable place
- Find location for live auction and a microphone
- Have tables for live auction items
- Have a table with three chairs for payments
- Have enough seating for workshop participants
- Signage
  - Silent auction location
  - Auction item drop-off
  - Payment location

- Penny wars location
- Supplies
  - auction information sheets, tape, and pens for check-in
  - silent auction bid sheets (200)
  - receipt books
  - calculator
  - Bins for penny wars
  - Boxes and dollies for moving items, if needed

#### Check-In of Items at the Workshop

- Use self-service check-in of items as they arrive at the workshop in prominent location near registration booth.
  - Leave boxes, pencils, and item tags with instructions for donors to fill out.
  - Provide tape and string for attaching cards to items.
  - Have blank certificates available for donations that are intangible.
  - Have volunteers assist with check-in and carrying items to storage.
- When collecting items donated, check that tag has been filled out and attached properly
- Separate items for silent auction or live auction (should be your choice, not the donor's)
- Store items until needed

#### Silent Auction Items

- Prepare silent auction bid sheet with item description, opening bids (set low), and bid increments
- Set out items so bidding can begin on time
- Pick-up bid sheets and items at specified time (no late bidding), make sure that bidding closes after concurrent sessions are over
- Pick-up bid sheets and transfer winning bid and name of successful bidder to item tag
- Notify winners immediately by posting a list of winners in a central
- Allow auction winners to pick-up and pay for items during posted hours; only specified people will take money for auction items

#### Live Auction Procedures

- Set out items for preview about 30 minutes before auction begins
- Limit live auction to 2 hours at the most and begin bidding on time—do not schedule entertainment before or during the auction. You will lose your audience.
- Strutters pick-up item from table (with item tag attached), carries it to auctioneer
- Auctioneer holds it up, announces it, and hands it back to strutter who carries it around room while bidding is going on
- When final bid is taken, strutter hands the successful bidder the item, fills out bidder's information and amount on tag, then takes tag to cash-out table
- Bidders can cash out anytime—all their live auction tags should be at the cash-out table (they should bring their own silent auction item tags after they pick up their items)
- Only specified people will take money for auction items
- NOTE: Auctioneers need to remember to not only move items along quickly, but to get the most money possible for the item. Auctioneers need to constantly remind audience



members that this auction is about giving to the future of the profession and not getting the best deal on what they purchase.

- Have auctioneer thank everyone profusely for donating and bidding throughout.

#### Penny Wars

- There are containers for each state/province in Region 5. Pennies deposited into the containers will give the state/province positive money amounts, while bills and silver coins negate money amounts.
- The state with the highest amount wins.
- Once put in a container, money cannot be removed and out into another container.

#### Worksheet #5

##### Live Auction Tally and Checklist

Item #	Item Description	Value	Donated By	Sold To	Auction Amount	Paid
1	Nature Ctr Shirt	\$15	John Smith	Polly Lee	\$25	Cash

#### Silent Auction Worksheet

Starting Bid \_\_\_\_\_

Increments \_\_\_\_\_

Item Description \_\_\_\_\_

Donated By \_\_\_\_\_ Value \_\_\_\_\_

Bid Amount	Name	
Winning Bid	Name	Paid

## Logistics Chair

It is the Logistics Chair who keeps the details of the Workshop in order by serving as a liaison between site staff, the audio-visual contractor and the Programs Chair. You may be working with various other committee members such as Off-site Session Chair and Registration Chair to determine the space and location needs that will define their responsibilities. Your Chinese fortune cookie says you are ultra-organized person - to a fault YOU ARE ORGANIZED!!

### Position Description

#### General Duties:

- Locate storage area for exhibits sent to workshop site prior to workshop
- Become aware of local union regulations and State laws affecting workshop (music, liquor, raffles, auction, etc.)
- Assist Finance Chair in identifying sponsors for program support
- Develop detailed timetable for tasks and track accomplishments of Logistics Committee
- Provide Finance Chair with a detailed budget, including program expenses and income
- Provide Workshop Chair with list of committee members, agencies, addresses, phone, fax and e-mail
- Keep copies of all correspondences

#### Food and Beverage Duties:

- Coordinate site space and food/beverage needs with assigned site staff
- Coordinate site food service including vegetarian options on menus, breaks, and bar service
- Determine menu and pricing for meals and breaks

#### Site Duties

- Obtain lodging registration information to be included in pre-registration packets
- Provide on-site staff a list of VIP room needs
- Keep steering committee updated on lodging reservations
- Obtain layout of site exhibit area
- Request data from lodging on actual numbers of sleeping rooms the group utilizes during the event ( it will help future committees negotiate with hotels)
- Serve as liaison with site staff to determine wording of daily marquis in lobby

#### Logistics Duties:

- Prepare list of alternative lodging with prices and locations
- Check on handicapped accessibility for site, special event and off-site session sites
- Coordinate space needs with Program Chair
- Investigate fees for site AV service or arrange for other AV service for needs identified by Program Chair
- Oversee AV activities during the workshop
- Arrange for transportation and other special needs for keynote speakers and VIP's
- Arrange for transportation needs identified by Off-site Session Chair
- Make arrangements for recycling of glass, paper, and aluminum products
- Coordinate printing of all tickets for special events and off-site sessions

- Prepare daily function sheets in order to determine meeting and banquet requirements
- Develop job descriptions for volunteer needs using information from steering committee
- Determine training and orientation needs for volunteers and provide appropriate training
- Recruit volunteers
- Determine volunteer recognition
- Schedule volunteers
- Select key volunteers to be trained in every on-site capacity

#### Signage Duties:

- Provide signage for all workshop events (what's in each room, how to get there, etc)
- Provide support for all signage needs (easels, etc.)

#### Helpful Hints

- Meal negotiators need to be aware of inclusion of service fees and taxes, known as "plus, plus" (++); it can add up to 25% to your meal costs
- **Keep menu options to a minimum to reduce cost, but do not forget to offer vegetarian and kosher meal options**
- Choose paper products over plastic whenever possible; glassware and silverware over disposable items; NAI members will love you for it and it's responsible!
- Take time to get to know on-site staff
- Check with lodging staff to see that they have adequate staff coverage at the registration desk during periods of anticipated participant arrival and departure.
- Have volunteers report problems with sessions to you (i.e. room temperature) and ONLY you serve as liaison to hotel staff to correct the problem
- Setup a schedule for the on-site staff of when you need to get to them, estimated numbers for meal counts, etc. (most site automatically include a 5% overage when preparing for meals, but NAI pays for the number we order, even if fewer show up at a meal than we estimate)
- Make yourself available during the workshop-- carry your cellphone or radio.
- Schedule speakers with identical AV needs in the same room; it will cut down on the number of pieces of equipment you will need to line up or rent

#### Worksheets

1. Sample daily master list
2. Sample function sheet
3. Typical meeting room setups

## Worksheet #1

### Sample Daily Master List

Make a table with each room, writing in setup, tear down, extra items needed specifically for a session, etc.

Thursday

Time/Rooms	Smith Rm	Jones Rm	Harris Rm	Exhibit Hall	Banquet
8:15-8:45am					Breakfast
8:45-9:30am	Setup AV equip	Setup AV equip	Setup AV equip	Exhibitors Arrive/Setup	Vacant
9:45-12:00pm	Sessions	Sessions	Sessions	Open	Vacant
12:00-1:00pm	Vacant	Vacant	Vacant	Open	Lunch
1:30-2:30pm	Sessions/ Needs extra table	Sessions	Sessions	Open	Vacant
2:30-2:45pm	Refill Water	Refill Water	Refill Water	Open	Snack
2:45-3:15pm	Regional Board Meeting	Vacant	Vacant	Open	Vacant
3:15-4:15pm	Session	Session	Session/Flip Chart	Open	Vacant
4:15-5:00pm	Vacant	Vacant	Volunteers for Auction Meeting/Training	Open	Vacant
5:00-6:00pm	Vacant	Vacant	Vacant	Closed	Meal
7:00-9:00pm	Vacant	Vacant	Vacant	Closed	Setup sound for entertainment

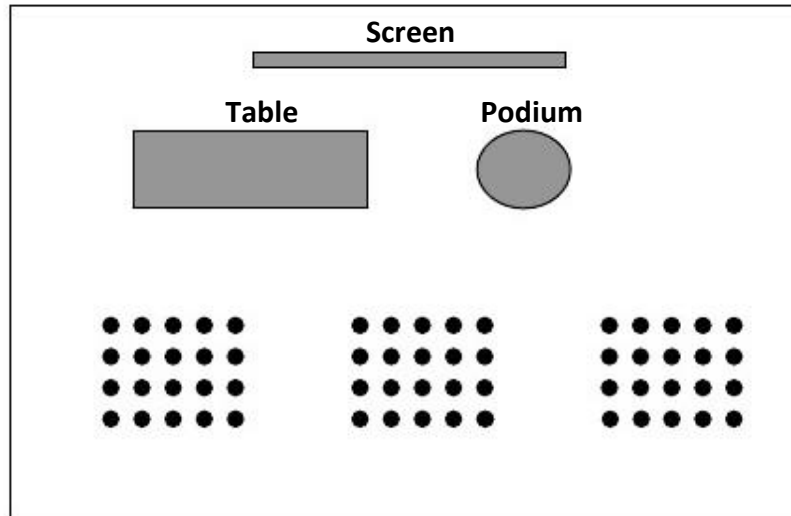
## Worksheet #2

### Sample Daily Function Sheet

Date:	Room:	Time In Use:
NAI Staff Contact:		Function:
Food and Beverage Requirements: Refill water stations at 10:45, between 12:00-1:00, and at 2:30		
Setup: Theater-style for 40 participants with one center aisle and side aisles Podium and microphone in front Six ft table with skirt to left of podium Two skirted six ft tables at back of room for water station		
AV Needs: Hotel provides podium at no charge AV contractor provides projector and screen 9:45-10:45 Kimmel Session- projector and screen 11:00-12:00 Jones Session- no AV needed 1:30-2:30 Miller Session- projector and screen		
Special Instructions: Speaker would like to use room to preview presentation at 8:45am Friday morning 3:45 Setup AV for Saturday and include a flip chart 4:00-5:00 Regional Board Meeting		

### Worksheet #3

#### Typical Meeting Room Setups

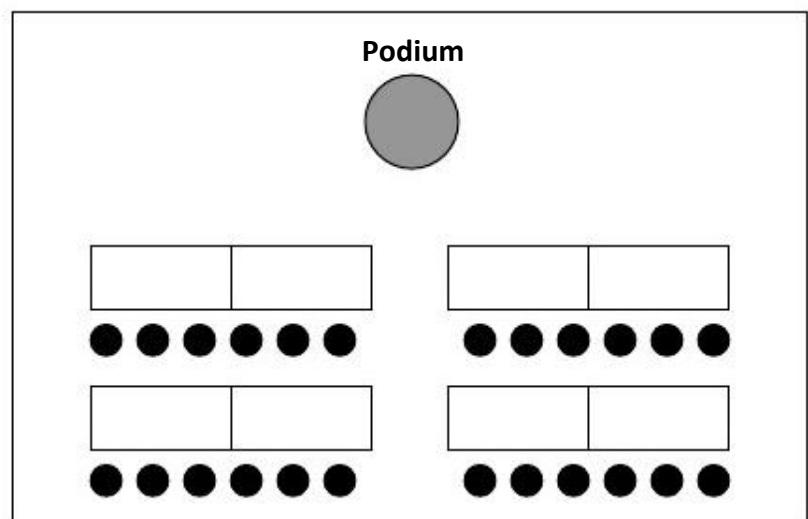


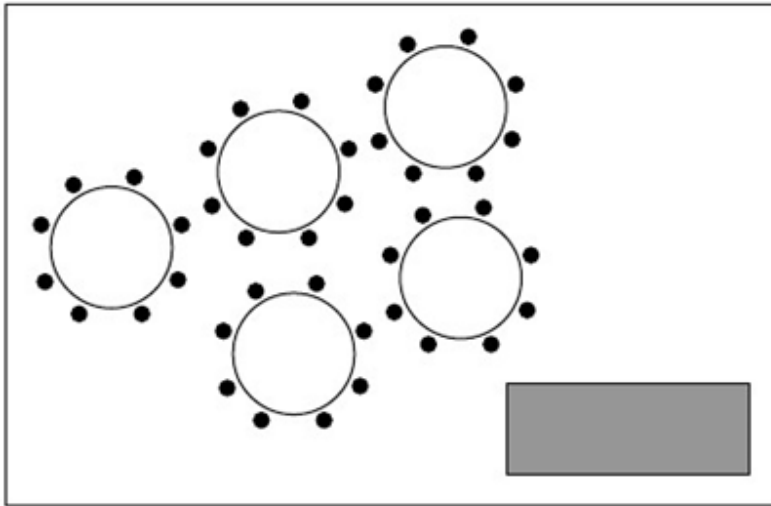
#### Theater Style Seating

Allow 6' aisles; leave sufficient space for doorways and water stations

#### Classroom Seating

Distance from table to front to next table is 4'-5' for maximum comfort. Use tables 6' or 8' long and 18", 24", or 30" wide. Allow 2' per person. Armchairs will require more space





### Banquet or Roundtable Discussion Seating

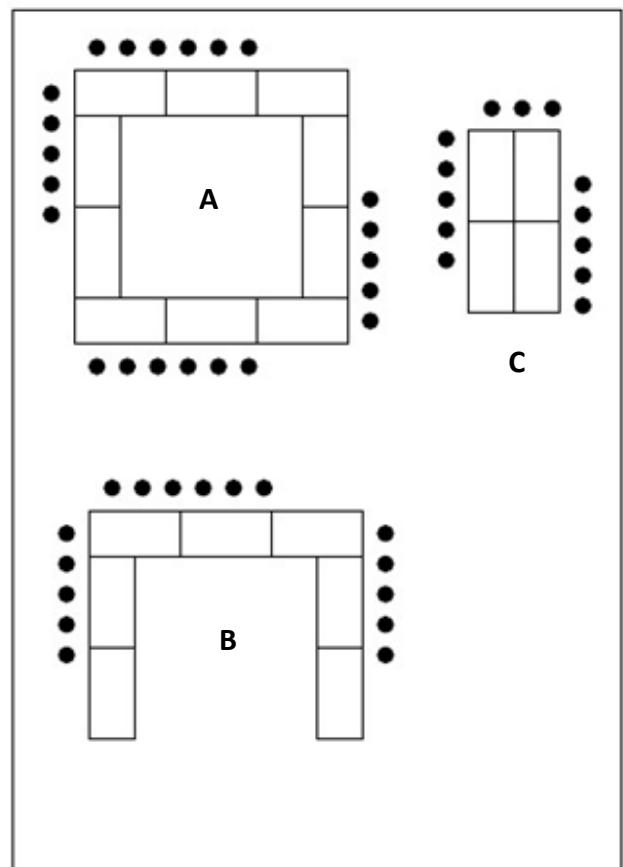
60" tables seat 8

72" tables seat 10

### Conference Seating Options

- A) Hollow square accommodates 40 people; idea for idea exchange
- B) Horseshoe accommodates about 30 people; ideal for idea exchange
- C) Conference style for small groups of up to 24; idea for board meetings and idea exchange

Allow 2' per person minimum elbow space, 3' for longer meetings. Use 24" or 36" wide tables.



## Promotions Chair

It is the main duty of the Promotions Chair to promote the Workshop and develop all workshop publicity. You will work closely with the Programs Chair so you will have information on presentations, special events, and keynote speakers that may entice participants to the Workshop. Since each Workshop has its own special complexion, it will be your job to identify special groups who may not be NAI members, but may be interested in participating in the Workshop. Gathering mailing labels, writing articles, and contacting those targeted for corporate support will be your major responsibilities. You need to be a sincere, focused, and forceful individual.

### Position Description

- Identify user groups with special interests in the workshop or those within the local area and obtain contact lists of those groups
- Develop and conduct fundraising activities prior to and during the workshop
  - Work with current Regional Fundraising Chair on this
- Identify advertising opportunities in workshop publications and on-site activities; solicit ads, cash donations, and in-kind services
- Develop promotional plan to excite and interest regional members in hosting future workshops
- Develop and implement promotional plan to include:
  - Articles and photos in regional and national publications of NAI and like-minded organizations
  - Workshop logo
- Identify publications needs with Program and Logistics Chairs; direct design, production and distribution of printed materials to include:
  - Call for Presenters
  - Pre-registration packet
  - Program bulletin
  - Flyers, news releases and other announcements
  - Signage
- Work with Program and Logistics Chairs to promote participation in auction and exhibit hall
- Communicate publication needs, deadlines, and formats to steering committee for all printed materials
- Design and arrange for production of commemorative items, if any

### Helpful Hints

- Use any contacts you can think of to find out which non-members may be interested in attending the workshop
- Work closely with the Program Chair when describing presentations or special events
- The Finance Chair will have information about what types of fundraisers since regulations vary from state to state
- Don't forget to advertise to adjacent NAI regions



## Off-site Sessions Chair

Off-site sessions are an important part of the Workshop. Each of the participants not only want to gain a sense of the local natural or cultural history, but they are interested in how interpretive services are offered in different parts of our region. It is your job to make those experiences as full and enriching as possible. Off-site sessions cannot be a side trip that participants could have done as well on their own, they must offer an unusual opportunity to visit a site under special circumstances. You will work closely with the Logistics Chair to coordinate the details of getting dozens of people to the right place at the right time and make sure they have fun once they are there! You must be organized, yet flexible.

### Position Description

- Develop detailed timeline for tasks and track accomplishments of committee
- Provide Finance Chair with a detailed budget including expenses and income
- Provide Workshop Chair with list of committee members, agencies, addresses, phone, fax and e-mail
- Keep copies of all correspondences
- Provide list of signage and graphics needs to Logistics Chair
- Provide list of volunteer needs to Logistics Chair
- Determine topics, sites, itineraries and participation limits
- Obtain leaders for off-site sessions
- Provide list of lunch costs to Logistics Chair, if applicable
- Determine off-site session fees with Finance Chair to include at least 15% profit margin for NAI
- Provide descriptions of off-site sessions to include in pre-registration packet and program bulletin
- Provide a list of transportation needs to Logistics Chair (may be easier to arrange transportation within your committee)
- Develop a list of self-guided off-site sessions for participants and spouses
- Color code each Off-site session trip ticket as to cost; this will facilitate exchanges ( it is too cumbersome to have one color for each trip)
- Work with Logistics Chair to develop uniformity in tickets for workshop events
- Number each off-site session ticket (and only print the number of tickets the trip has space for, that way there will be no mix-ups!) and sell the lowest numbered tickets first
- Make sure NAME of each trip is on each ticket
- Schedule departure times and points of departure
- Check for lunches/beverages for all trips the morning of the off-site sessions
- See each trip out, if possible
- Use vans instead of buses for small groups
  - In the past, participants have received small workshop registration refunds for offering a vehicle for off-site transportation (mini-vans, suvs, etc). Workshop and Finance Chairs need to work out the details prior to advertising, getting final approval from the Regional Treasurer. A contract needs to be signed by the driver and a copy of proof of insurance needs to be received prior to the workshop.

## Helpful Hints

- Understand charges for 'live' and 'dead' hours for bus contacts
- Stay in close coordination with Registration Chair to watch as registration approaches maximum number of off-site session participants
- Use only knowledgeable guides as trip leaders
- Each trip should have a 'host' on board transportation to answer questions, etc, if the leader is not in the bus/van with the group
- Schedule an off-site session committee person to at the front desk during registration/information desk hours to answer questions
- In registration materials, identify trips which are not appropriate for families and which are not handicapped accessible
- Identify in registration materials the level of difficulty for each site
- Make sure all food and drink is coordinated with Logistics Chair
- Plan on not attending a session unless you drive to meet a group some place, you must be in control of your own transportation
- Coolers for soft drinks can be a problem; finding enough, getting them back to owners in good condition are the main problems. Improvise with trash bags and ice, but remember lodging sites and charge dearly for ice, so find out ahead of time what their policy is
- Transportation companies need deposits, plan for it
- Preview all trips for time and appropriateness
- Make sure there are copies of the release form at the registration desk for participants to sign if they paid with a check. (Online registrants electronically sign theirs when registering.)
  - Work with Registration Chair to confirm that an electronic release form is included in the online registration.

## Worksheet

1. Heartland Region indemnification release form release agreement

## Worksheet #1

### NATIONAL ASSOCIATION FOR INTERPRETATION

#### Heartland Region Indemnification Release Form Release Agreement

In consideration of being permitted to participate in off-site sessions at the 20xx National Association for Interpretation Heartland Region Workshop in (INSERT STATE), I for myself, my spouse, my children and my heirs, do hereby agree to release and hold forever harmless the National Association for Interpretation and Heartland Region, workshop and program co-chairs, off-site committee chairs and members, any other sponsors and supporting agencies or organizations, their agents, trustees, owners, and employees from any and all liability resulting from injuries or death to myself or my minor child, named below, or another person, or damage to my property, whether caused by the negligence of agents, employees, and owners of the off-site session site or otherwise sustained while participating in any activity related to any of the off-site sessions operated by the Heartland Region Workshop.

I further understand that such activities involve the risk of injury, death, and/or property damage and I agree to assume said risks being fully aware of the dangers posed by such activities.

I further agree to obey all rules and regulations established by the staff and trustees of the National Association for Interpretation and staff of the off-site session sites and all applicable local, state, and federal laws.

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Print Name

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Signature

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Minor's name (if applicable)

## Registration Chair

Registration is the introduction of the Workshop to the participants. The message conveyed in the registration packet will help them make the decision about coming to the Workshop. You need to anticipate participants' needs and questions before they do. Information about the workshop sessions, off-site sessions, special events and the schedule should be easy to find and understand. You are also the on-site welcoming committee, the first smiling face they will see when they get to the Workshop. You will need to be organized and have all the answers to all the questions. Simple!!

### Position Description

- Develop detailed timetable for tasks and track accomplishments of committee
- Provide Finance Chair with a detailed budget including program expenses and income
- Provide Workshop Chair with list of committee members, agencies, addresses, phone, fax, e-mail
- Keep copies of all correspondences
- **Registration online is highly encouraged.** Contact the Membership Manager, Jamie King, to setup online registration. Also, she will need your e-mail address so confirmations can be e-mailed to you as people register.
  - You will need paper copies of the registration form and a liability waiver (contact the Off-site chair for this form) for those who need to pay with check or purchase order.
  - Keep a three ring binder of copies of registration forms, payments, and confirmations and organize alphabetically for those who pay by check or purchase order.
  - Send originals to Regional Treasurer weekly, at minimum.
  - Keep a Microsoft Excel file of all who have registered and whether they have paid with cash, online credit card, purchase order, etc.
- Keep copies of all the deposits and organize them by date of deposit.
- Provide list of signage and graphic needs to Promotions Chair
- Provide list of volunteer needs to Logistics Chair
- Handle general inquiries about workshop
- Obtain transportation information and map to and from workshop site to be included in pre-registration packet
- Obtain parking information for inclusion in pre-registration packet
- Secure area/regional maps and other Chamber of Commerce promotional material for local area to be included in registration packet
- Identify needs for registration space, computers, tables, supplies, staff, etc. and arrange with Logistics Chair
- Oversee registration desk, hospitality desk, and nerve center coverage and supplies
- Establish site and system for message board, job mart, and "free handouts" table; coordinate needs with Logistics Chair
- Order name tags (plastic clip-on pockets to insert printed name tags) and ribbons designating speakers, exhibitors, and board members.
- Exhibitors' fees will sometimes include one or more registrations or reduced registration fee for exhibit booth attendants; with Programs Chair, determine a policy on this issue

- Establish a system of color-coding for registration name tags to indicate which registrant is registered for which days or meals

### **Helpful Hints**

- Sales items should be sold in a place separate from registration
- Have current information regarding program cancellations, changed venues, etc
- Any registration that is 'unusual', like exhibitors, scholarship attendees, keynotes, etc, should be put on a colored paper to make it easily seen
- In designing the registration form, let as many people as possible review it prior to printing
- Participants appreciate getting as much information about the program as possible in the pre-registration packet (this includes tentative program schedule of what may be happening which day so they can plan if they are not attending all days)
- Make sure registration site at site venue is easily accessible
- Make separate areas for pre-registration and on-site registration. Pre-registered participants can pick up name badge and registration packet right away. If registrants want/need to make changes they need to do that at the on-site registration area.
- When scheduling staff for registration, schedule short shifts, it can be a burn-out job during high check-in periods
- Put tickets for special events inside plastic name badges one day before registration opens
- Name tags can be printed up late in the game (one month before). By this time the majority of registration should have arrived and name tags won't be wasted on participants that drop out
- Plan for message and bulletin board near registration area
- Get as many things prepared for registration as you can one day prior to the workshop; things such as nametags for pre-registered, volunteers, speakers, steering committee, packet assembly and special event tickets
- Identify all registration issues and potential problems with check-in to determine how to handle them and prepare WRITTEN registration guidelines for pre-registration, on-site registration and changes to registrant choices for special events and off-site sessions
- Hold intensive training for all volunteers working at the registration desk -- especially on-site registration --include how cash will be handled, how refunds will be made, how change will be made, how non-registration sales (t-shirts, raffles, etc.) will be handled, how cash sales away from the workshop site will be handled, and how payments/purchases will be made from on-hand cash
- Have auction desk be separate from the registration desk, but within close proximity
- Early bird registration should end at least one month before the workshop begins, too many people wait until the last minute if it is less than a month out
- The break between early bird and regular registration needs to be a considerable difference to encourage early registration
- Registrations cannot be called regular and late; many government agencies will not pay late fees
- Setup registration 4-6 hours prior to opening and do trial runs by registering steering committee and volunteers
- Schedule volunteers to sell sale items and allow registration people to concentrate on

registering participants

- Participant names on workshop packets is a nice personal touch
- Include in the workshop packet final confirmation stating balance due
- Work with Regional Treasurer to find out how to handle credit card on-site
  - Encourage cash or check whenever possible due to high credit card fees

### **Worksheets**

1. Procedure to check-in workshop participants
2. Checklist of registration desk supplies

## **Worksheet #1**

### **Procedure to Check-in Workshop Participants**

#### **Pre-registered participants:**

- Each participant will have sent in a registration form, check, or credit card information
- Each will have received a receipt or confirmation
- When registrations are received, a copy of the registration form, payments, and confirmations will be organized alphabetically in a three ring binder
  - Originals will be sent on to the Regional Treasurer weekly, at minimum
- Welcome participants by greeting them with “Hello John Smith and welcome to the NAI Heartland Region workshop!”
- Check for a balance due and collect any necessary money
- If they have not included a check or there is a problem with payment, the name tag will be flagged and the registration staff can straighten out the problem at the time of check-in
- Checking them in should be as simple as handing them a name tag and registration packet, if fully paid
- Have participants sign a release form for the off-site session if they did not register online
- Any changes in concurrent sessions, off-site sessions, etc. should be handled at the registration area
- Reference job board and volunteer sign-up

#### **On-site registration:**

- Welcome the participant to the workshop
- Have the participant fill out a registration form and collect payment
  - Keep separate for pre-registration participants since Regional Treasurer will need this new information
- Sign them up for available off-site sessions
- Have participants sign a release form for the off-site session
- Hand them a registration packet
- Make them a name tag
- Reference job board and volunteer sign-up

## **Worksheet #2**

### **Checklist of Registration Deck Supplies**

- wastebaskets
- staplers
- extra staples
- paper clips
- rubber bands
- stick pins
- Velcro tape
- scissors
- tape measure
- rulers and yardsticks
- tool kits (hammer, pliers, wire, etc.)
- extra bulbs for A-V equipment
- glue
- rubber stamps and stamp pads
- staple removers
- storage containers
- registration forms
- zippered money bags
- receipt book
- liquid paper
- pencils and pens
- computer and printer
- adhesive labels
- lined pads of paper
- telephone message pads
- petty cash slips
- extra file folders