

Guidelines for Organizing a NAI Regional Workshop

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**National Association for Interpretation
Region IV, Great Lakes Region**

Table of Contents

I. Can We Host A Workshop?(A Checklist)

II. Developing a Workshop Proposal

III. What Our Workshops are Like (General Overview for Preplanning)

- Awards
- Budget
- Credit Card Payment of Registration
- Contracts
- Giveaways
- Group size
- Insurance
- Length of workshop
- Meetings of Committee
- Member Mailings/Database
- NAI Logo
- NAI Staff/National Board Attendance
- Payments
- Promotion/Publicity
- Regional Board Support
- Registration
- Rotation of Workshops by State
- Sessions
- Setting
- Space Requirements
- Sponsorships and Donations
- Tax Exempt Status
- Timetable
- Theme
- Timing
- Weekday vs. Weekend
- Workshop committee structure

IV. Workshop Committees and Responsibilities

- Chair/Co-Chair
- Registration
- Program
- Special Events
- Logistics (Food and/or Lodging)
- Mobile workshops
- Publicity
- Sponsorships/Donations

V. Regional Board and Committees Responsibilities

- Director
- Deputy Director
- Treasurer
- Scholarships and Grants Committee
- Awards
- IPG grants
- Ways and Means

VI. Finance Details

- Approval and Payment of Workshop Expenses
- Budget Deadline
- Budget Format
- Confirmation Letters
- Insurance
- Membership Verification
- New Members at the Workshop
- Methods of Payment by Registrants
- Receipt of Income
- Refunds
- Sponsorships and Donations

VII. Registration

- Approval and Mailing of Registration Booklet
- Booklet Checklist
- Confirmation Letters
- Families and Spouses
- On-Line Registration
- On-Site Registration Area
- Volunteers
- What if Registrants Don't Fit our "Categories"?
- When to Expect Registrations

VIII. Program

- Auction
- AV Equipment
- Awards
- Book Swap
- Business Meeting
- Call for Presenters
- Gimmicks and Gadgets/Marketplace of Ideas
- Keynote Speakers
- Leadership Forum
- Mobile Workshops
- Networking Time
- New Members/Meet a Mentor
- Opening and Closing
- Outdoors
- Presenters
- Programming Tracks
- Room Monitors and Volunteers
- Scheduling
- Theme and Logo

IX. Logistics

- Agency Information
- Alcohol
- AV Equipment
- Bulletin Board
- Evaluations
- Exhibitors/Vendors
- Food
- Hospitality Room
- Meals
- Nerve Center
- Recycling
- Regional Exhibit
- Site Coordinator
- Transportation

X. Where to get "Stuff" for the workshop

- Filemaker Pro Database
- Financial Questions
- Forms
- Letterhead
- NAI Region 4 Logo
- Name badge holders
- Reimbursement of expenses
- Ribbons
- Workshop evaluations
- Zip sorted mailing labels

XI. Printing and Mailing Responsibilities

- Call for Presenters
- Confirmation Letters
- Flyers
- Letters of thanks

Media Release
Name Badges
Registration Materials
Schedule of Sessions
Workshop evaluation forms

XII. Wrapping it All Up

Evaluations
Final Report
Finances
New members
Next Year's Planning
Wrap-up meeting

Appendices

- A. Locations of Previous Workshops
- B. Timetable
- C. Sample Workshop Budget (2002) and Current Forms from Treasurer
- D. Invoice
- E. Reimbursement Form
- F. Guidelines for Inviting National Office Staff or National Executive Board to a Workshop
- G. Registration Materials
- H. Confirmation Letter
- I. Sample Schedule at a glance
- J. Sample Evaluation
- K. Sample Media Release
- L. Call for Presenters
- M. Mobile Workshops
- N. Sample Letter to Mobile Workshop Hosts
- O. Auction
- P. Sample Contract
- Q. NAI National Nonprofit Status Letter
- R. Sample Sponsorship/Donation Letter and Information
- S. General Tips from the Top: Ideas from Previous Workshop Chairs
- T. Holding Meetings With Results
- U. Sample Release Form for Mobile Workshops
- V. Regional Workshop Disbursement Form
- W. Room Monitor Letter and Guidelines

I. Can We Host A Workshop?

Here's a checklist of questions to ask yourself to find out if you have the volunteers and facilities, and time to host an NAI Region 4 Workshop! You will need to look over the entire workshop guidelines to get a sense of the entire process for hosting a workshop, but these are "the basics" with which all of our great workshops begin. We are sure the answer is a resounding YES!

- ___ We have at least one person (and preferably 2 people) willing to chair/co-chair the workshop.
- ___ We have a "pool" of local interpreters/interpretive agencies willing to donate staff time and resources to assist with a workshop, both in the planning and during the workshop itself.
- ___ We have individual NAI members interested in chairing the primary committees (program, logistics, publicity, registration, mobile workshops.) (See committee responsibilities for time commitments and duties.)
- ___ We have a facility that will accommodate 120-200 people for sleeping and eating, provides a large meeting room for up to 200 people and has at least 6 breakout rooms for sessions. Also needed are a registration area, a nerve center/room for the workshop committee, storage space for auction items and Great Interpreters' Quiz materials, and exhibit space. The facility may or may not be located in a "natural setting." (Natural is obviously preferred.)
- ___ We can offer the workshop in the spring (March-April) on weekdays (generally Tuesday-Thursday is preferred).
- ___ We have contacted the NAI Region 4 Director and/or Deputy Director regarding our interest.

II. Developing a Workshop Proposal

An interested committee should present a written proposal to the Regional Deputy Director approximately two years prior to the date of suggested workshop.

Site location should:

- Adequately serve the logistical needs of approximately 150 participants (actual attendance may be higher or lower)
- Be easily accessible by car, accessible by wheelchair
- Have reasonably modern and comfortable sleeping facilities
- Provide good mobile workshop opportunities
- Be priced to reflect the profile of NAI's average workshop attendee. (in-line with the previous two workshops)

Written proposals should include:

Brief Introduction:

- proposed dates, location and camp or hotel

Workshop Committee:

- List co-chairs, job title and agency
- List committee heads (if known), job title and agency

Workshop site:

- Brief Description - include number of meeting rooms, number of beds, AV situation, camping, alternative . housing options
- Physical location -- how far from nearest regionally known town/city, natural history features

Facilities:

- Number of guest rooms and maximum number of participants that can be accommodated
- Alternate sleep accommodations nearby
- Number of meeting rooms and seating capacity (Suggested minimum of 6 per time slot, of 30 per room)
- Dining facilities, capacity, vegetarian option?

Cost:

- Rough estimate of guest room charges (lodging)
- Rough estimate of registration fee
- Rough estimate of meals (if separate from registration)
- If all meals are not included with registration, are restaurants within walking distance?

Potential special events:

- approximate cost

Theme and potential general sessions or guest speakers:

- approximately cost

Potential Mobile workshop sites:

- 4 to 5 half /full day trips
- topics to cover
- mode of transportation- private transportation company or car pool with agency

transportation?

Cooperating and supporting agencies:

- provide list of them

Proposed schedule:

- listing tentative starting and ending time - Suggested 3 1/2 days

Names of members preparing the proposal:

- include addresses and phone/fax numbers

III. What Are Our Workshops Like (General Overview for Preplanning)

Awards: Our regional awards are presented at the workshop. The Program Committee should work with the Awards Committee to arrange this. In addition, certificates of recognition are provided to speakers/session leaders (can be placed in registration packets or presented by room monitors at sessions). These are prepared by the Program Committee. Certificates are also presented to the Workshop Chair(s) and Workshop Committee Chairs. These are prepared by the Director/Deputy Director and are usually presented at the Business Meeting. Certificates can be prepared by the Workshop Chair(s) for all committee members if they choose to do so.

Budget. The workshop committee must prepare a detailed budget of expected income and expenses. This budget must be approved by the Director and Treasurer. It should be completed and in the hands of the Deputy Director by October 1 of the year prior to the workshop. For details of what to include in this budget, see guidelines on page 12. (Sample budget: Appendix C.)

Credit Card Payment of Registration. NAI Region 4 does accept credit card payments for registration and other workshop expenses. There is a (currently) 4.25% surcharge for each credit card transaction; that amount needs to be budgeted for on a per-person basis. The number of credit card registrations per year varies; it is important to talk with the Regional Treasurer about the number from the previous year when you are developing your workshop budget.

Contracts: All contracts should be reviewed by both the Regional Director and the Deputy Director and **signed ONLY by the Regional Director**. This includes hotel contracts, bus or other transportation contracts, performance contracts, etc. (Sample contract: Appendix P.) All contracts over \$1,000 must also be reviewed by the National Office before approval.

Give-Away: These optional items can be built into the workshop cost. Examples include tote bags, pen, pad, etc. These should be kept to under \$8 per person.

Group size: We can expect 120 - 180. If the workshop is held in a central or metropolitan area, count on attendance in the upper range; if on the fringes of the region, expect a figure in the lower range. Base your break-even figure on 120 to 140. If there are special events that will cause an increased cost if numbers exceed 120-140, make sure to add those costs into the budget.

Insurance: NAI has a medical policy bought specifically for workshops that covers medical costs if someone is injured during one of our events for an amount up to \$5,000. If someone has no personal coverage or worker's comp, this would be the coverage. NAI's liability umbrella handles the liability exposure up to a total of two million dollars. No additional fees are required to insure nonmembers, volunteers or family members attending workshops. (Higher fees for nonmembers are suggested; the difference is usually the cost of a 6 month membership in NAI. This encourages them to become involved in the organization long-term.) All off-site events and activities require a signed release form (See Appendix U). Special conditions apply for insurance on rental vans for mobile workshops or other events; see the insurance section under finances for details.

Length of workshop: A Tuesday late morning until Thursday night is suggested. Longer workshops often draw a smaller attendance. If your workshop is held on the "fringes" of the region, you can consider adding Monday night events or a Friday breakfast for those travelling

long distances.

Meetings of Committee: You may initially want to have a meeting with everyone interested in helping with the workshop. This meeting can be facilitated by the workshop chair(s) or someone else if preferred. This meeting provides an opportunity to talk about committees (who wants to do what), locations, themes, etc. A second meeting with everyone might include a time for all to share ideas and hear progress reports on the initial plans (location, theme, etc.) and a time for individual committees to break out and get organized. Subsequent meetings will work best if committee chairs meet together and provide updates and reports from their working committees (who meet at other times or work individually with the committee chairs as needed.) It is recommended that the committee meet every 2 months to begin with and more often if needed as the workshop gets closer. It is also recommended the committee meet at the workshop site a few times so the committee gets to know the site well prior to the workshop. These on-site meetings are particularly important in the last few months before the actual workshop. (See “Holding Meetings with Results” in Appendix U.)

Member Mailing List/Database: Zip sorted mailing labels for mailing the registration booklets are obtained from the Membership Manager in the National Office. See the Deputy Director for more information about this database.

NAI Logo: It should appear on all announcements - call for presenters, registration packet, etc.

NAI Staff Attending Workshop: Sometimes, a national office staff member or Executive Board member can attend the workshop. It is important to ask each year. A request must be submitted with concrete dates to the NAI National Secretary prior to the Fall National Board Meeting. Workshop costs must be covered. A complete list of requirements/needs is included in Appendix F.

Payments: The Treasurer is responsible for payment of most bills after the workshop. The Treasurer can provide “petty cash” to the Workshop Chair(s) that can be used for small items that cannot be billed to the Region. Payments can also be made with the NAI credit card or by using the standard NAI reimbursement forms. (See Approval and Payment of Workshop Expenses in the Finances Section for complete details.) Workshop committee members should use the Region 4 Workshop Disbursement Form (Appendix V) to indicate payment of expenses for the purpose of tracking. Completed copies of this form must be provided to the Treasurer so that expenses can be paid.

Promotion: The Publicity Committee prepares an announcement for each *FourThought* newsletter up to a year before the workshop. The call for presenters, generally prepared by the Program Committee and the Publicity Committee, should be available at the previous regional workshop and should appear in the spring or summer *FourThought*. Registration information, prepared by the registration committee should be mailed separately from newsletters. The call for presenters and workshop registration booklet should be reviewed by the Deputy Director prior to release. The workshop registration booklet is also reviewed by the Regional Director.

Regional Board support: The Deputy Director is the primary Regional Board contact for the workshop committee, though both the Deputy Director and Director work very closely with the Workshop Planning Committee. The Deputy Director and/or Director should meet at least 3-4 times with the committee. The Regional Treasurer also works very closely with the committee on all financial matters and approves, with the Regional Director, the workshop budget.

Registration Materials: This is the registration information sent out to NAI members. A draft booklet should be done 7 months prior to workshop and should be mailed 5 months prior to the workshop. The final draft needs to be approved by the Director and Deputy Director prior to printing and mailing.

Rotation of Workshop Sites: The Regional Deputy Director and the Director will work with the group from different states to schedule workshops. It should rotate from one state to another each year. A list of previous workshop locations is included in Appendix A.

Setting: Have the meeting in a natural setting if possible. Most members prefer comfortable accommodations. In many situations, participants will bring spouses and family members. (A discussion of costs for spouses/family members is included in the Finances Section.) Some do like it “rougher” and prefer to camp if it is available. See Appendix A for information about previous workshop locations.

Sessions: The two major benefits to most participants are the actual sessions and the networking opportunities provided. Sessions generally include a series of concurrent sessions (3-4 times, 4-5 sessions per time block; some 1 hour, some 2 hour but this is flexible), a day or half-day of mobile workshops, a special event of some sort (optional), a “Gimmicks and Gadgets” or “Marketplace of Ideas” session for idea exchange, a new member/meet-a-mentor reception, a “mixer” or ice breaker of some sort and a keynote speaker or entertainment (optional). Time also needs to be provided for a business meeting, awards and a leadership forum. There is great flexibility in organizing sessions; work closely with the Deputy Director to ensure that the required sessions are offered. (See Program Section for more details.)

Space Requirements: Approximately 6 meeting rooms are needed for concurrent sessions. Also needed are a registration area, a room large enough to fit the whole group in for general sessions (preferably NOT a room that is also being used for concurrent sessions; sometimes it is the same room where meals are served), an area to store auction items, exhibit space and a nerve center area (for the workshop committee to use).

Sponsorships and Donations: We make every effort to keep workshop costs down, and sponsorships/donations can help do that. Sponsorships can be for individual items (a meal, a mobile workshop, the give-a-way, etc.) or general cash donations to be used to defray costs as needed. Sponsorship levels exist (See Sponsorships in the Finances Section) and recognition should be provided in the program booklet and during the workshop. The two previous workshops have solicited approximately \$2000 in sponsorships and donations, but this amount can vary depending on costs and events planned. It is a good idea to know how many sponsorships/\$\$ you will have prior to setting workshop fees.

Tax Exempt Status: We have a NAI non-profit tax exemption and a copy of that letter is included in Appendix Q of these guidelines. Each state also has a state exemption from sales tax form of some sort. We do not have this form in Indiana. In Ohio, it requires the completion of a form each year/workshop to get a blanket exemption. Details are not currently available on Michigan. Be sure to discuss this issue with the hotel and any other vendors in relation to food, meeting space, etc. We should not have to pay sales tax on any of these items. This issue should be discussed with the Regional Treasurer, since rules may change.

Timetable: The workshop site is selected by the Executive Board and should be selected and announced at the year before workshop. This provides a good promotion opportunity for those most likely to attend. It also allows plenty of time to call for presentations and for attendees to

block off calendars. (See “Timetable” Appendix B)

Theme: The committee should select a theme that can be enhanced by the workshop site or selection of presenters. Try not to make the theme too restrictive. A workshop logo should be designed to tie into the theme. See Appendix A for previous themes.

Timing: It is best to offer the workshop in the spring (March or April) so there is no conflict with the fall National Interpreters Workshop.

Weekdays vs. Weekend: Weekday meetings are favorable. In early spring, school groups are not at their peak. Those two or three days can be blocked off if known far enough in advance. Weekends can conflict with special events.

Workshop Committee: It is recommended to have at least 5 or 6 people on the Workshop Planning Committee. In addition to the overall chairperson, other committee members can chair subcommittees which should include: program; logistics (lodging/food service); special events (can be combined with program) mobile workshops; registration; publicity, sponsorships/donations and Deputy Director. These committee responsibilities can be combined or rearranged based on your site as long as the responsibilities are covered. It is recommended to have current NAI members making up most of your committee.

IV. Workshop Committees & Responsibilities:

Chair/Co-Chairs

- Establishes and follows “timeline” for workshop planning.
- Ensures that all committees are established and working.
- Evaluates options for sites with committee and Deputy Director.
- Coordinate work of and meetings with committee chairs and members.
- Develop agendas for planning meetings.
- Provides minutes of meeting to committee, deputy director and chair for following year.
- Stay in touch with the Deputy Director.
- Secures site contract - Reviewed and signed by Regional Director.
- Prepares budget for submission to Director and Deputy Director.
- Ensures that workshop committees are coordinating efforts with standing regional committees (awards, membership, etc) for activities during workshop.
- Handles on-site oversight of workshop and announcements/troubleshooting as needed.
- Produces workshop follow-up report.
- Meets with next year’s workshop committee following the workshop for questions.
- Ensures that post-workshop activities are completed (names of new members to Treasurer and membership chair, bills paid, thank you’s, etc.)

Registration

- Prepares registration booklet with Publicity Committee.
- Works with Regional Website Coordinator to establish a secure web-based registration option.
- Available for phone calls/questions during the period following distribution of the registration materials and especially during the month prior to the registration deadline when the majority of registrations can be expected.
- Collect all registration and processes money through Region Treasurer.
- Sends confirmations to participants (using Filemaker 4.0 database if possible).
- Provides information regarding volunteers to workshop committees.
- Prepares on site information packets for workshop participants.
- Prepares name tags for participants and ribbons for presenters, workshop committee, Executive Board, etc.
- Assigns participants room/roommates (where applicable).
- Send invoices to agencies where PO’s are used.
- Prepare a list of invoices mailed to who, when and amount, for Treasurer at conference.
- Prepares list of new members for Region 4 membership committee.
- Submits list of new members and addresses to treasurer and Regional membership committee chair.
- Prepares a list of workshop attendees for distribution at workshop.
- Sets up, staffs and maintains on-site registration table/area.

Program

- Prepares call for presenters to be ready to distribute at the previous regional workshop and submit to FourThought for the spring and/or summer newsletter.
- Organizes schedule of all events and activities in coordination with workshop and standing committees, including (but not limited to):
 - special events committee
 - membership committee (for meet a mentor and/or new member reception)
 - scholarship/grants committee for auction

- mobile workshop committee
- exhibits committee (time/location)
- workshop logistics committee (session room assignments, AV equipment, schedule)
- Regional Director for business meeting and “getting involved in the region” session; opening and closing announcements
- Secures speakers.
- Selects presenters.
- Sends confirmations to presenters.
- Provides presenter info to registration committee as needed.
- Work with publicity and publications chair in production of booklet, etc.
- On-site oversight of concurrent sessions, announcements, special events, mobile workshops, etc.
- Sends thank yous to presenters.
- Oversees the work of a workshop volunteer coordinator who trains and assigns room monitors and other volunteers.

Special Events (optional; can be a part of the Program Committee)

- Coordinates selection of vendors for exhibit area; setup of exhibit area (works with program and logistics chair)
- Coordinates book swap.
- Coordinates awards ceremony with Awards Chair
- Coordinates special evening event or “night out” (optional)
- Coordinates auction with Scholarships and Grants Committee Chair
- Coordinates other evening special events such as coffee houses, “Great Interpreters’ Quiz” or other icebreaker events

Logistics and Food

- Lives/works within easy access of the actual workshop site and serves as the liaison with the site coordinator.
- Selects meals and snacks with committee and secures catering if needed.
- Organizes food for mobile workshops.
- Room selection for registration, meals, sessions, meetings, exhibits, and special events in conjunction with other committee chairs as needed.
- Coordinates AV, bulletin boards, easels and flip charts, etc.; communicates with program chair and awards chair for these needs
- Sets up recycling center if possible.
- Ensures that housing is available for any special guests as needed.

Mobile Workshops:

- Finds and coordinates sites (4-6, depending on location and participants expected; should include both natural and cultural history options).
- Coordinates transportation (agency vans/drivers, rental vans/busses and drivers, etc.).
- Finds and coordinates leaders for trip.
- Provides clear info about NAI, our members’ needs/preferences for mobile workshops, times, topics to cover, need to BE MOVING as much as possible, etc. to the on-site speakers/leaders of the workshops.
- Provides written trip descriptions for Registration Booklet to the Publicity Committee.
- Coordinates food for trips with Logistics chair.
- Recruits NAI members to act as hosts for each mobile workshop, and drive if need.
- Prepares evaluation forms for mobile workshops (to be used on the day of the workshops).

Publicity/Publications:

- Layout and design of call for presenters (works with program chair) by the previous regional workshop.
- Layout and design of registration materials (works with registration and program chairs).
- Mailing of registration materials.
- Provides information and articles to *FourThought*, Regional Secretary for NAI News and Regional Website Chair.
- Coordinates registration information on the web with the registration chair and the

Regional

Website Chair.

- Prepares Workshop Guide includes daily schedule, site map, session description and locations to be placed in workshop packets.

Sponsorships and Donations

- Coordinates any giveaway/comp items for workshops registrants
- Coordinates efforts to contact individuals, agencies and private companies regarding sponsorships of events and materials related to the workshop.
- Contacts individuals, agencies and companies about sponsorships.
- Ensures appropriate recognition of sponsors in workshop materials, signage and during announcements as needed.
- Provides thank you's to all workshop sponsors.

V. Regional Board and Regional Committee Responsibilities in Relation to the Regional Workshop

Director

- Signs contract, provides letterhead to committee
- Approves final workshop budget
- Proofs registration material prior to final printing.
- Coordinates leadership forum and business meeting

Deputy Director

- Acts as a committee member attends 2-3 workshop committee meetings when possible.
- Receives copies of all workshop committee meeting minutes
- Acts as liaison between executive board and workshop committee.
- Proofs the call for papers and the registration materials prior to printing

Regional Treasurer

- Approves final budget
- Provides receipts for workshop participants
- Processes money for National office, and new member information
- Supplies seed money and/or reimbursements

Scholarship & Grants Committee Chair: (appendix M)

- Responsible for auction organization (both main auction and silent auctions throughout workshop, if appropriate)
- Coordinates selection of grant recipients to attend workshop.
- Contacts workshop registration chair to coordinate registration deadlines with selection of grant recipients

Awards Committee Chair

- Works with Director regarding presentation of the awards.
- Works with Program committee as to the amount of time needed for presentation, which day the awards will be presented, materials and av equipment needed

Interpretive Projects Grants

- Announces the winners at the workshop - Suggested to present these at general session time, or have on-going display

Ways and Means:

- Coordinate the Regional exhibit and sales with the logistics and/or exhibits chair

VI. Finances

Approval and Payment of Workshop Expenses: The Regional Workshop Chair needs to approve and track each committee's expenditures.

Bill Payment: Bill payment is made in three ways. No payment should be made without first sending the Regional Treasurer a NAI Region 4 Workshop Disbursement Form (Appendix V).

1. The Treasurer is responsible for making all large payments regarding the workshop. Site deposit, speakers, hotel/food bills, etc. This is the preferred method of payment for workshop expenses. When needing money for these items use the NAI Disbursement Form included (Appendix V) and the NAI Reimbursement Form (Appendix E). Photocopies may be made of these forms. Notify the Treasurer when invoices will be sent directly to him/her. Checks request for workshop costs should be made in advance when possible so checks are available for the workshop. Use invoices as much as possible (Appendix D, if needed). Because of the limited availability of petty cash, expenses/ services at the workshop site (during the event) should submit an invoice and expect payment in 2-3 weeks following the workshop. Exceptions can be made, but should not be the rule. If necessary, the Treasurer has access to an NAI credit card to make payments when an invoice is not possible.

2. "Petty cash" of \$200 is provided to the Workshop Chair to handle small bills that cannot be invoiced for later payment by the Treasurer. The Workshop Chair manages these funds and is accountable to the Treasurer and the Region for them. Receipts and/or cash totaling \$200 must be provided to the Treasurer at the end of the workshop.

3. Bills can be paid out of pocket by committee members and reimbursed by NAI using the NAI Regional/Section Disbursement Form (See Appendix E), but this can take 4-6 weeks. Any request for reimbursement by a workshop committee member or chair should be approved by the overall Workshop Chair before being submitted to the treasurer.

Budget Deadline: The committee must present a proposed budget to the Deputy Director by October 1 of the year prior to the workshop. The Deputy Director will present the budget to the Director and Treasurer for approval.

Budget Format: Although you will probably begin by calculating the total cost per person for each item listed below, *the budget needs to be presented in total costs per category listed below*, in the order listed. (See sample budget in Appendix C.) This is important because these categories correspond with categories used by the National Office in tracking expenditures. (If you want to provide a supplemental document detailing costs per person, this can help the Director/Treasurer if they have any questions about your total costs.)

Income

- Registration
- Profit (for budget purposes only)
- Sponsors/Donations
- Exhibit Booth Fees (optional)

Expenses

- Registration fees
 - Printing costs for registration booklet
 - Credit card fees from national (4.25% per transaction)
 - Mailing costs for registration (booklet, confirmations, etc.)

Food and Lodging

- All meals, including snacks charged at the main lodging facility)
- Room fees if included in registration
- Complimentary room fees (hosting national offices, grant winners, etc.)

Mobile Workshop Costs

- Box lunches
- Van or bus rental
- Gas for vehicles
- Site entrance fees
- All other costs for mobile workshops

Program/Concurrent Sessions

- Speaker fees
- Entertainment
- Special meeting rooms
- Any program fees (AV equipment, materials, etc.)

Gifts/Comps

- Give away items
- Complimentary registrations (NAI National Officers, workshop committee, etc.)

Miscellaneous

- All costs not included in prior categories (might include such things as tape, paper, markers, copies, phone calls, etc.)

Confirmation Letters: Upon receipt of the payments, the Registrar records the following minimum information and provides a confirmation letter with workshop details and this information:

- registration fees due
- mobile workshop registration fees due and trip selection
- special event fees due and event selection
- rooming accommodations and associated fees due
- miscellaneous charges/fees due
- amount paid; method of payment
- PO# and amount of PO if applicable
- amount charged and credit card number/type (We are set up to handle VISA, Mastercard, Discover or American Express.)

Insurance: Workshop participants do not have to be members of NAI. Members, nonmembers, workshop volunteers, speakers, etc. are covered by NAI's insurance policy. We encourage the workshop committee to charge a higher fee for nonmembers, at least equal to the cost of a 6 month membership in NAI. When they become a member, they will receive newsletters, etc. and be more likely to become a long-term participant in our organization.

Release Forms are needed for all off site events, such as mobile workshops, special events, etc. Self-insured groups, small non-profits, bus companies should provide certificate of insurance. If there are questions concerning these activities consult the Executive Director in the National office.

Insurance for van or bus rentals for mobile workshops should be made using the NAI credit card (contact Treasurer) if possible. In this case, NAI's insurance is invoked. It is a \$500 deductible policy, so it is wise to buy the extra collision insurance for the first \$500 only. Thereafter, NAI's main liability policy kicks in for a vehicle up to \$25,000. NAI's medical policy bought specifically for workshops would handle an injury during any of our events for an amount up to \$5,000. If someone had no personal coverage or worker's comp, this would be the coverage. NAI's liability umbrella handles the liability exposure up to a total of two million dollars. If you rent a car or van in your name with your credit card, your personal insurance is invoked even though you may claim it was a business use. They consider the method of charging the cost a measure of your business use. Volunteers who are not members should not drive vehicles with members to off-site sessions, unless the driver's agency is involved in the workshop and their agency covers their liability.

Membership Verification: Two weeks prior to the workshop a list of all registrants must be faxed to the National Office for membership verification to membership manager.

New Members at the Workshop: New member packets are available through the National Office and would be nice to have available at the conference. Supply a list of all new members to the Regional Membership committee at the conference.

Methods of Payment by Registrants

- Checks: mailed to the treasurer who will process them and mail to the National office.**
All workshop checks must be made out to NAI not region 4.
- Purchase Orders: a bill must be sent to the agency to request payment. (See "Invoice form" Appendix D) The registrar will send out invoices as the P.O s are received.
Note: The registration committee will be responsible for processing purchase orders and creating invoices for registration. After the workshop, the registration person will continue to process these for approximately one month, or until the majority of the payments have been received. Second requests will be sent out to those agencies or individuals still owing at that time. The remaining unpaid invoices will then be turned over to the treasurer, who will proceed with collection. Copies of all invoices mailed out should be kept and given to the treasurer at the completion of the workshop.
- Credit Card : We are set up to handle VISA, MasterCard, Discover or American Express. There is a fee for credit card use and these fees are a workshop expense. The workshop is charged by the National office at a rate of 4.25% for each transaction. Make sure to include this in the budget!

Receipt of Income: Sponsorships and Donations: All cash and checks will be sent to the Treasurer as received. An accurate list of sponsors and donors will be maintained by the Sponsorship Committee Chair.

Registration: The registration committee will receive credit card, checks or purchase orders for payment of workshop fees. **All cash, checks and claim forms are to be sent to the Treasurer on a biweekly schedule until 7 days before the workshop.** The Treasurer will sign all claims, write receipts and deposit all workshop monies. Receipts will be returned to the Registrar one week before the workshop. Receipts can be sent to registrants prior to the workshop or placed in their workshop packets. (Generally, the confirmation letter sent by the registration committee indicates what has been paid for and can serve as a receipt if needed prior to the workshop.)

Registrations received in the 7 days prior to the workshop are to be held for the Treasurer and receipts will be provided at the workshop.

Refunds: Refund policies should be set by each workshop committee based on requirements for fees to camp, dates lodging facility requires meal numbers, etc. The committee should discuss their proposed policy with the regional treasurer, before putting it in writing on the registration forms.

A typical refund policy will state: “Refund requests must be in writing. Any refunds granted will be made following the completion of the regional workshop. There will be a 20% service charge for refunds requested before the registration deadline. There will be a 50% service charge for refunds requested between _____(date) and _____(date). No refunds will be issued for requests made in one week of the start of the workshop.”

*Bold faced items are required. Other statements may vary with workshop logistics. For example, if Region 4 has had to pay a registrant’s meals or lodging costs up front (as in the case of a camp deposit) refund service charges should cover those expenses. When establishing your refund policy remember that refunds will be issued from the National Office and will take a few weeks to process. In the case of severe hardship, partial refunds have been issued when requests were made within the deadline. This is up to the discretion of the workshop chair and regional treasurer.

On occasion, a registrant will have to cancel at the last minute and will want his/her registration used by someone else if they cannot get a refund. If there are scholarship or grant applicants present at the workshop who did not receive a grant, these registrations should be used first for these applicants. If there are no individuals present who applied for but didn’t receive a grant to the workshop, the registrations can be applied to the cost of a workshop committee chair or member who did not receive assistance.

Sponsorships and Donations: Sponsorships and donations can be in the form of support (either direct \$\$ or in-kind services) for a specific event/portion of the workshop (sponsoring the printing of the registration booklet, a meal, a speaker, a special event, a give-away, etc.) or a general contribution (\$500 to be used for general expenses, etc.). Three sponsorship levels are recognized: Gold (\$1000 and above), Silver (\$500-\$999), and Bronze (\$0-\$499). Agencies providing staff time for workshop planning/hosting should be listed separately as Supporting Agency Sponsors. These should be listed in the registration booklet and sponsors should be recognized at the workshop as well.

Some individuals/agencies cannot solicit donations or sponsorships. Be sure the individual(s) working on this committee will not have any ethical problems with this through their agency.

The best sources for sponsorships may be organizations that we work closely with, such as bookstores, exhibit/design firms, etc., but there are many local groups/organizations that may be willing to help as well.

The best approach for soliciting sponsorships is to send an initial letter describing NAI and the workshop, along with a brochure, a copy of Legacy or other publication, etc. that will give them a sense of what interpretation is. (See Appendices R and S.) Follow-up with a phone call or a personal visit.

Set a deadline for obtaining sponsorships that accounts for when the workshop budget is due and

registration fees must be set. You can still solicit sponsorships after this deadline, but you will have developed fees and a budget based on known amounts, not projections that may not materialize!

Tips for Preparing Your Budget

- Begin early asking workshop committee chairs to anticipate their expenses and prepare a budget for their committee. It is reasonable to expect committee chairs to have their individual budgets to you by August 1. This allows you to prepare the budget and bring it to a workshop planning meeting for review and “double checks” prior to submitting it to the Deputy Director.
- Begin by preparing a “cost-per-person” for each item, then multiply based on your break-even number (generally 120).
- Region 4 will cover expenses for up to six workshop committee chairs. Some workshop committees choose to take this total amount and divide it between all chairs instead. That’s fine. Some committees have chosen not to take advantage of this option, but it should be something that all agree on—often there are individuals who really need the complimentary registration/room, but won’t say anything. It is up to the workshop chair(s) to be sensitive to this and guide this decision.
- A national office staff member or board member should be invited to attend, using the guidelines outlined in Appendix F. We cover room, board and registration) Travel expenses are incurred by the National office. This does not occur ever year. This is something that region 4 does as a courtesy not as a policy.
- Regional Board Members (Director, Deputy Director, Secretary, Treasurer, Newsletter Editor) get their registration at a break-even rate (determined by you in the budget process.)
- Auction income is not credited to the workshop income. It is tracked through the Scholarships and Grants account.
- In years prior to 2002, registration/room/board for the 3 workshop grant recipients needed to be accounted for in the workshop budget. Beginning with 2002, these costs will be absorbed by the scholarships and grants committee.
- Surplus: Generally, we would like for the regional meeting to end with a surplus of at least \$2000. Predict all expenses, and tack on a per person amount for this surplus. For example, if you plan on an attendance of 120, a conservative addition of \$20 per person would generate \$2400. Should be figured on break-even numbers of 120-140.
- Setting Workshop Fees: Fees should cover all expenses plus profit. Generally there is approximately a \$35 difference for NAI and non-NAI members. This is the amount it costs to cover a 6 month membership in the fee for the non-member fee, which can be used as a promotional tool (no longer required for insurance purposes.) Consider a lower fee for students.

VII. Registration Materials

Approval and Mailing: Following approval of a printed proof by the Regional Director and Deputy Director, a registration booklet should go out as a separate mailing preferably 5 months prior to the workshop. Zip-sorted labels are available from the NAI Membership Manager. The registration booklet and form should also be placed on the website at that time.

If the workshop site is one that would be accessible by members from an adjoining region, a notice of the workshop can be bulk e-mailed from the National Office to members in that region. Contact the Membership Manager.

In addition, articles about the workshop and reminders that the workshop registration booklet will come under separate cover should appear in the fall and winter *FourThought*. These announcements are the responsibility of the workshop promotion/publicity committee.

Booklet Checklist: The registration booklet content should be assembled as needed by all workshop chairs. The design and layout of the booklet is the responsibility of the promotions/publicity committee. (See Appendix G for sample). The booklet should include:

General Information

- ___ Workshop logo, at least on cover and possibly in other places
- ___ NAI Great Lakes Region logo(available from Reg. Director)on the cover and on the mailing panel.
- ___ Dates of workshop
- ___ Location (a small map may help people identify the town)
- ___ Description of site (general info about accommodations and natural features in the area)
- ___ Workshop sponsors (NAI Region 4 and other cooperating agencies)
- ___ Workshop chair name, phone, fax. (You may wish to list all committee members.)
- ___ Schedule: Provide a schedule which gives participants a general idea of the sequence of events.
- ___ Schedule (days of week, starting and ending times each day)

Workshop sessions

- ___ Highlight keynotes and special general sessions
- ___ List concurrent session titles (subject to change) with a one line description. Speaker and Agency. (This info is important to administrators who scrutinize subject matter when determining if staff can attend.)
- ___ Mobile workshops or field training (Do not refer to them as field trips): include fee, transportation arrangements, travel time, appropriate clothing and in case of all day workshops, if a meal is included or on their own.
- ___ Special events: auction, award presentations, business meeting, evening socials, additional fees and transportation arrangements. Be sure to briefly describe each of these. New or non-members may not be familiar with them.
- ___ General session descriptions: if offering session such as Gimmicks and Gadgets, be sure to describe it. New or non-members may not be familiar with it!
- ___ Do any sessions have limits? If so, indicate that early registration is advisable!

Workshop Costs/Fees

- ___ Include a clear explanation of what is covered in each type of registration fee.
- ___ Include a section explaining how to make lodging reservations if this is not included in

- registration fee (hotel, camping, etc.)
- ___ Include a section explaining location of airports, rental cars, etc. if appropriate.
- ___ Explanation of meals covered in registration and alternate locations for meals
- ___ Is there a limit to the number of participants the workshop can handle? Lodging? If so, indicate the need for early registration!

Registration Form

- ___ Deadline for registration (coordinate with scholarships and grants to make sure they will have grant recipients chosen prior to the deadline.)
- ___ Place for registrant to fill in:
 - ___ Name ___ Agency ___ PO#
 - ___ Address ___ Zip ___ Agency address (if different from registrant)
 - ___ Daytime phone/fax ___ Member? Region 4 affiliate? Non-member ?
 - ___ Willing to volunteer as a room monitor or other assistant
- ___ Include a membership form
- ___ Place to indicate a preferred roommate and place to request a roommate
- ___ Place for registrant to indicate special needs (e.g. sign language interpreter, etc.)
- ___ Registration fees
 - ___ Early and regular with dates (It is generally best to not use a late fee, since federal agencies are not authorized to pay them)
 - ___ Daily registration fees-indicate if these fees cover special events held on that day
 - ___ Walk in fees if applicable - be sure your site can accommodate walk-ins, including last minute additions to meal counts. Walk-in fees should be significantly higher than regular registration to discourage large numbers of them.
 - ___ Mention of fees for spouses or children to attend special events if appropriate
 - ___ Lodging fees, if separate
- ___ Meal cost, if separate-what meals are included. If some meals are not included, indicate elsewhere in materials alternate meal options (restaurants nearby) offer a Vegetarian option.
- ___ Detail what is included in the registration fee
- ___ Include Payment information
 - ___ Make checks payable to NAI (not Region 4)
 - ___ Send registrations and payment to (workshop chair/address/phone/fax)
 - ___ NAI Federal ID# FEIN 84-1036-938
 - ___ Refund policy (See Refund Policy page.....)
 - ___ Credit card use - Master Card/VISA/American Express are accepted. Need
 - ___ Number ___ Name on card ___ Expiration date ___ Signature

Confirmation Letters: People begin looking for this when they send in their money. They generally should be sent within two weeks of receipt of the registration. See Appendix H for a sample confirmation letter. Things to include are:

- Reminders of what to bring (including auction item)
- Mention how they will get their receipt (it can be put into their registration packet received when they arrive)
- Special clothing needs.
- Time zone change?
- Include a site phone and fax number to leave with family.
- Map to site.
- Smoking and alcohol policy
- Reminder to bring bedding, if applicable.

- Confirmation of Mobile workshop selection.
- Contact person(s) for questions.
- Specific times on the first day, ie. when dinner start.
- Fees charged/paid (see confirmation letter section under finance for details).

Families and Spouses: It is our intent to focus the content of our programming efforts during the workshop on the interpretive professionals who attend. In general, we do not offer events designed with the families of interpreters in mind, but there are some families who enjoy attending and we are glad to have them join us. These general guidelines should apply:

Adult spouses or significant others who plan to attend sessions should pay either a full registration fee if attending the entire conference or one day registration fees for those days present.

Adult spouses, significant others or children attending a meal or special event should pay a standard rate established in advance by the workshop committee for that meal or special event.

Children (ages 6-18) attending sessions will be charged a half-price registration fee if attending the entire conference or a half-price one day registration fee for those days present.

Children under age 6 are not encouraged to attend concurrent sessions, but will not be charged a fee.

On-Line Registration: On line registration can be made available through the use of a secure server. Our Regional Website Coordinator/Chair can assist with this by providing a link from our Region 4 page at interpnet.com to the secure server, where the registration booklet and registration page will be located. In past years, we have worked with Natural Concepts, Inc., who provided the secure server. Check with the NAI National Office on this; they may also be able to provide a secure server at no cost. Website registrants may pay only with Master Card, VISA, and America Express. It is important that ALL workshop events be included on the website, just as they are in the workshop booklet. Don't forget any pre-workshop listings.

On-Site Registration Area: All participants will appear here at one time or another to pick up registration packets and ask questions. Keep adequately staffed during peak times (the 3-4 hours prior to the first workshop sessions, during breaks and prior to meals, etc.) Also, maintain for late arrivals. Those that travel from a great distance may arrive the night before. Provide registration when they arrive. When the booth is not staffed, provide a sign indicating when it will reopen. At registration, participants should receive:

- Information packets with receipt, program schedule (Appendix I), evaluation form (Appendix J), meal tickets, the latest issue of FourThought (if appropriate), mailing list of all participants, and site map with meeting rooms, news release that attendees can send to their local paper (Appendix K) and an evaluation form for the workshop.
- Name tag
- Speaker, committee or officer ribbons
- Mobile workshop confirmation
- Complimentary gift/item

Post a bulletin board here for messages. Post a "Jobs" opportunity board close by as well. Tables for agency brochures/materials are usually located near the registration area. Finally, post a listing of NAI committee meetings that might be held during the workshop. For example, the 2003 Workshop Committee might hold a meeting, the Membership Committee might hold a meeting, etc.

Volunteers: Many NAI Region 4 members "volunteer" at our workshops. Their roles range from Workshop Chair to room monitor to manning the Region 4 booth. It is our policy that

volunteering to assist at the workshop does not entitle registrants to discounts, other than those given to Workshop Committee Chairs(see Tips for Preparing Your Workshop Budget under the Finances Section.) If sponsoring agency staff or volunteers are willing to assist at the workshop, we can make accommodations for that. Volunteers who work at the registration area and do not attend sessions can do so at no charge. Volunteers who gain knowledge/information as a part of their services (room monitors, mobile workshop hosts or van drivers) should pay registration fees (one day or full conference, depending on their level of participation).

What If Registrants Don't Fit Our "Categories"? No matter what you do, you'll have people who want to attend for part of a day, come for one event, or somehow not know which type of registration to send. There will have to be some on-the-spot decisions made in these cases. It is important that the final decisions be handled by one person if possible—it can be the Registrar or the Workshop Chair---so that they are made fairly and equitably.

When to Expect Registrations: The general pattern is that you will get several registration soon after the booklets go out, then they'll "trickle" in until the week or so prior to the early and regular registration deadlines. You'll then get an onslaught of phone calls, faxes and e-mails with questions and registrations. It is important that the Registrar be available throughout the registration period to answer questions, process registrations and get confirmation letters out quickly. It is especially important that the Registrar be available on the deadline day for early registration, regular registration and single-day registration.

Consider in advance if there are limits for specific events or for the conference in general. Make sure these are discussed in the program book and the Registrar has a method for tracking to ensure that numbers aren't exceeded.

VIII. Program

* Denotes activities that are a required part of the workshop schedule.

***Auction:** This vital part of our regional treasury funds our scholarships. The Scholarships and Grants Committee handles the actual auction with the help of the Treasurer. The Workshop Program Committee needs to work with them on time, location, storage of auction items, silent auctions conducted during the day, etc. of the Treasurer. The second night (early) is a good time for the auction. Provide plenty of long tables (6-8) on which to place items. Auction tables should be set up when participants arrive the first day. This allows them to scan items before the auction and bid on silent auction items. The Treasurer provides bidding cards and the means of recording and collecting money. Space is needed to store the auction items prior to the auction night.

AV equipment: Many of the sites will offer AV equipment for the meeting rooms, but they may charge extra for it. If they do not, try to find agencies to borrow the equipment from. The program committee based (on speaker needs) may be able to set up 2-3 rooms with projector, overhead, etc and schedule the presenters who need this equipment accordingly. If there will be expenses for equipment, be sure to include this in your budget.

*** Awards and Scholarships:** Schedule 1 hour for presentations of awards and scholarships. The presentation will be coordinated by the Regional Director and the Awards Chair. Academic Scholarship recipients can be announced by the Scholarship Chair during the Awards Program. Grant recipients can be announced as well. Check with the Awards Chair to see if any audiovisual equipment or other materials (a table for awards, etc) is needed and make sure these are in place prior to the presentations.

Book Swap: This event has been held for the last couple of years. People bring books to trade, get “book bucks” in exchange that they can use to choose books that others have brought. If this event is held, encourage people to bring natural/cultural history books; there were 2 boxes of books left over last year that were placed in the auction.

***Business Meeting:** Allow a minimum of 1 hour, preferably 1 hour and 15 minutes for a business meeting (preferably on the second day)

Call for Presenters: A form used to solicit speakers needs to be designed to have available one year prior to the workshop at the spring workshop. Make sure the deadline for receipt of these gives ample time to select and confirm presenters, and then provide information about concurrent sessions/presenters to the promotions/publicity committee for the registration booklet. A confirmation to presenters should be sent out prior to finalizing the registration materials. See Appendix L for a sample call for presenters.

Gimmicks and Gadgets/Marketplace of Ideas: A popular idea sharing session. Try to schedule it near the end of the workshop. Announce this session in the *FourThought*, and in the registration materials. Have a scheduled time in the workshop when everyone can attend and someone to lead the session. In 2001, this event was replaced with a Marketplace of Ideas that was well received. Interpreters with program ideas, tips and tricks and performances gathered in an “exhibit hall” format.

Keynote Speakers: Good to have, but if not a “National name”, inspirational, or “entertaining”, don’t bother. Keep the keynote short. Non-members, keynotes must also receive 3 months basic professional membership for insurance coverage purposes.

***Leadership Forum:** A concurrent session items slot should be set aside for the Director to have a leadership forum meeting.

Mobile Workshops : A 1/2 day or full day should be devoted to Mobile workshops. Some people prefer a shorter workshop so try to provide a variety of lengths. Select a wide range of topics also...cultural /natural history, etc. Make sure that the mobile workshop chair clearly describes our group and our needs to workshop hosts. Most mobile workshop attendees don’t want to sit and listen to speakers for hours—they want to see sites, ask questions and get ideas for their programs/places. Explain that a lot of our concurrent sessions are inside and may require a good bit of sitting and listening---the mobile workshops should be something different! Make sure that Mobile Workshop titles and descriptions in the Registration Guide match what’s actually going to happen! See Appendix M for a sample mobile workshop schedule and Appendix N for a sample letter to mobile workshop hosts.

Networking Time: Interpreters enjoy talking one-on-one with other interpreters, trading ideas and information. It is important to build time for this into the workshop, but it is also important that the schedule provides a variety of useful sessions. Don’t over schedule---but don’t leave a lot of large, open time slots, either. Good luck finding a good balance!

New Member Reception/Meet-a-Mentor. One of the important things we need to do at regional workshops is make those attending for the first time feel welcome. Schedule a time for a reception/social/networking. This should generally include some snacks. The map of where members lived/worked was particularly well-received. The planning of any actual activities should be coordinated with the Membership Committee.

Opening and Closing: Allow time to let the Director and the Workshop Chair(s) give an opening and closing to the workshop. The opening should orient them to the site, introduce the workshop committee and board members.

Outdoors: If the setting is beautiful, use it! Get people outside! Have one meal as a cook-out, or have sessions outdoors if possible.

Presenters: Many speakers are from our own ranks. Many will be workshop attendees. It is NAI’s regional and national policy not to provide speaker payments or stipends. However, it may be appropriate to bring in “experts” in the field (i.e., biologists or historians to present their current research findings). These people may require a fee, and this is acceptable if the speaker will have a broad base of appeal. Build the fee into your total registration fee. If someone does charge to come, and if you anticipate the program being popular, you might consider offering it to the entire group or offering it twice. Ribbons or some form of recognition are generally provided for presenters during the workshop. Be sure to acknowledge all presenters at the closing. A thank you letter should be sent to the presenter’s supervisor. A certificate should be mailed to each presenter or placed in their registration packet upon arrival to the conference.

Programming Tracks: It's good to have a blend of natural history, "nuts and bolts", cultural history, "hands-on" interpretive techniques, skills enhancement, management sessions, etc. Each workshop program should incorporate sessions on the following topics: Management/Supervisory, Non-personal Interpretation, Basic ID/Natural History, Cultural History, Certification How-To, and a Student Forum or presentation.

Student Involvement- the student involvement committee will develop a session for NAI student members to practice and receive feedback on their presentation skills.

New Member Involvement-a new member meet and greet, special event or informational meeting should be offered.

Room Monitors: Recruit regional officers, grant recipients and volunteers to introduce session speakers, and assist with set up AV equipment.

Scheduling: Allow some slack time in case things run over. Make sure that presenters stick to the schedule. It is frustrating for participants to be late for their next session. ((Appendix I) Be sure to leave time for bathroom breaks and time to get to sessions.

Theme and Logo: Kept simple and general.

IX. Logistics

Agency Information: Provide a “Showing Off” Area: for posters, brochures, etc. Generally two 8’ tables will do.

Alcohol: Often, workshop participants take off in the evenings for a local watering hole. You may want to encourage people to have their refreshments at the site, if the site allows it. This keeps the group together for that informal interaction (plus it keeps them off the roads afterwards). Beer and wine must be separate. It can not be purchased with NAI funds. Provide soft drinks, cider or tea for nondrinkers.

AV equipment: This can be the responsibility of the logistics chair or the program chair. Many of the sites will offer AV equipment for the meeting rooms, but they may charge extra for it. If they do not, try to find agencies to borrow the equipment from. If there will be expenses for equipment, be sure to include this in the program committee’s budget.

Bulletin Board: Provide an area for people to post job announcements, resumes, and other announcements, etc.

Evaluations: Make sure they are easy and quick. The next year’s workshop should have some inputs into what questions are asked. Completed evaluations are sent to next committee. Make sure items are explained fully like the Auction, Gimmicks and Gadgets so those evaluating know what it is. (Appendix J)

Exhibitors/Vendors: (Optional) Discuss with Deputy Director about fee structure. Exhibitors should be chosen carefully. Suggestions include art/education stores, nature stores, nature bookstores, regional exhibit (need to have) and a location for NAI national items (shirts, books, etc.) Make sure the times when vendors/exhibitors are set up is a time when the majority of workshop participants will be on site and available.

Food: Be sure to consider vegetarian options, and suggest that their foods be clearly marked at buffets (or allow them to go first). For buffets, be sure to list beginning and ending times so those “late-risers” know when they can slide in for coffee and a pastry! Build in a few extra meals and, where box lunches are being ordered for off site sessions, order at least 2 per mobile workshop to ensure that you have enough!

Hospitality Room: Participants appreciate having coffee and tea available throughout the day in some central location. This can also be a good place to post job announcements and agency brochures.

Meals: A banquet is not necessary, coordinate meals with lodging, snacks at the auction. box lunches for mobile workshops. If you choose to have a more expensive meal include it in total registration fee, not as an optional expense.

Nerve Center: This is an area where all the supplies can be stored (AV equipment) and committee work can take place. It is a good idea to bring extra pens, paper, markers, notebooks, folders, a computer and printer for last-minute nametags and other work, poster board, flip charts and lots of chocolate!!!!

Recycling: If possible, use reusable/washable cups for coffee and provide a recycling can for cans (or Michigan deposit containers). Urge attendees to bring a travel mug for example.

Regional Exhibit: Provide space and an 8' table for the NAI regional display. Coordinate this with the Ways& Means Chair.

Site Coordinator: You will have a sales representative or site coordinator. It is important to maintain close contact with this person. Generally, one person should work with the site coordinator to handle questions, etc. It will be beneficial for the final couple of workshop committee meetings to be at the site if possible, and for the program committee chairs and logistics chair to “walk through” the workshop with the site coordinator a couple of months before the actual workshop.

Transportation: Cover the cost of transportation for the mobile workshop in the fee for these activities. Other transportation should be included in the registration fee.

X. Where to Get “Stuff” for Region 4 Workshop

Financial Questions: Regional treasurer

Forms: duplicate from this booklet or contact Deputy Director

Letterhead : Region 4 Director

NAI Region 4 logo: Region 4 Director/Deputy Director- National Website

Name badge holders: check with previous workshop committee or Deputy Director, or purchase.

Reimbursement for Expenses: Approval for expenses required by Workshop Chair. See finance section for details.

Ribbons for presenters/officers: check with previous committee or purchase

Workshop evaluations: Deputy Director

Zip sorted Region 4 mailing labels: NAI national office, allow about 2 weeks receiving them from the Membership Manager in the National office

XI. Printing/Mailing Responsibilities

Call for presenters: Contact FourThought editor(s) to see what format they would like it in.

Confirmation letters: For registrants and speakers

Flyers: to hand out to workshop attendees at prior year’s workshop

Letters of thanks: mailed to speakers and /or their supervisors

Media Release

Name badges:

Registration material: do not insert in FourThought, bulk mail separately. If no sponsoring agency has a bulk mail permit, check with FourThought editor or regional director for other option

Schedule of sessions: to distribute at workshop

Workshop evaluation forms: one page

* Remember - bulk mail may take up to three weeks to receive. Schedule mailings accordingly.

XII. Wrapping It All Up

Evaluations: It is the responsibility of the workshop chairs to either compile the evaluations or delegate this responsibility to some committee member.

Final Report: Workshop Committee Chair(s) will prepare a final report for the Deputy Director. Please provide 2 copies to them. The report should include: Registration materials sent to members, additional comments about the workshop, copy of call for papers, registration packet, copy of confirmation to presenters and speakers, budget, evaluations, workshop chair (name to contact), committee members names, on-site information given out at the workshop.

Finances: It is the responsibility of the workshop chair(s) to ensure that the Regional Treasurer has all bills. The workshop registration chair should handle purchase orders as needed with the Regional Treasurer's assistance.

New Members: A list of new members name's and addresses from the workshop should be provided to the treasurer and the regional membership chair by the workshop registration chair.

Next Year's Planning: It is advisable that the workshop chairs and any workshop committee chairs who can do so meet with the workshop chairs/committee members for the next workshop.

Wrap-up Meeting: It is recommended that the workshop committee hold a wrap-up session to discuss the workshop and evaluate its success. Each committee chair should provide a short summary of things that went well and possible improvements for next year.

Appendix A. Locations of Previous Workshops

AIN, The Great Lakes Region V (Indiana, Michigan, Illinois, Wisconsin, and Minnesota)

- 1976: Inheriting our Interpretage. Southern Illinois University's Touch of Nature Outdoor Labs. Carbondale, IL
Chair: Tim Merriman
- 1977: Somewhere in here in, AIN reorganized and we became Michiana, Region IX (Indiana and Michigan)
- 1978: Nature is Out-of-Doors. Storer Camp, Jackson, MI Chair: Bob Wittersheim
- 1979: ??Title??. Muskegan, MI CoChairs: Sandy McBeath and Earl Wolf
- 1980: The Challenge of New Audiences. McCormick's Creek State Park. Spencer, IN Chair: Marianne Newsom
Brighton
- 1981: Interpretation Looks to Outdoor Education. Hartley Outdoor Education Center. St. Charles, MI.
CoChairs: Roger Bajorek, Tom Smith
- 1982: ??Title??. Forest Beach Camp New Buffalo, MI. CoChairs: Jim Bull, Brian Forist
- 1983: Future is Now. Walled Lake Outdoor Education Center. Milford, MI. Chair: Barbara Garbutt
- 1984: Program for Practitioners. Pokagon State Park Group Camp. Angola, IN. Chair: Fred Wooley
- 1985: Fall Potpourri. Battle Creek Outdoor Education Center. Dowling, MI. Chair: Pat Bolman
- 1986: Media and More; Camp Millhouse, South Bend, IN. CoChairs: John Schaust, Tom Blodgett, Evie Kirkwood
- 1987: Tilden to High Tech; Hartley OE Center, St. Charles, MI
CoChairs: Huron-Clinton Metroparks and Cleveland Metroparks

AIN and WIA merge; become NAI; We become NAI Region 4 (Great Lakes Region)

- 1988: Blending of Resources; Spring Mill State Park, Mitchell, IN. Chair: Tim Cordell
- 1989: Outside Insights; Camp Michindoh; Hillsdale, MI
CoChairs: Diane Valen, Ruth Jacquot, Julie Champion, Phyllis Vaughn, Bob Wittershiem, Evie Kirkwood
- 1990: Looking Forward, Looking Back; Camp Cheerful, Strongsville, OH. Chair: Bob Hinkle
- 1991: Interstate Exchange; Pokagon State Park, Angola, IN. Chair: Fred Wooley
- 1992: Targeting Interpretation; Recreation Unlimited, Columbus, OH
CoChairs: Gary Moore, Leslie Phillips, Gary Mullins and Michele Mazzei
- 1993: The Basics and Beyond; Camp Friedenswald; Cassopolis, MI. CoChairs: Kip Miller, Sarah Reding
- 1994: Finding a Common Thread; Turkey Run State Park, Rockville, IN
Chair: Lise Schools, Marquita Manley, Mary Beth Eberwein, Barbara Cummings, Cathy Meyer
- 1995: Interpretation the Preservation and Restoration of Regional, Cultural and Natural Areas; Toledo, OH
Chair: Denise Gehring
- 1996: In Our Trust; Echo Grove Camp and Conference Center, Leonard, MI. Chair: Kathleen Dougherty
- 1997: Thawing Perceptions; Northern Michigan University; Marquette, MI. CoChairs: Chuck Howe, Jean Kinnear
- 1998: Get on Board the Boatload of Knowledge; (Hotel and Cabins) New Harmony, IN. Chair: Peggy Brooks
- 1999: Gather and Go!; Radison Harbor Inn Sandusky, OH (5 days, 4 nights). Chair: Paul Sherwood
Setting: In a harbor off shore of Lake Erie
Room Accommodations: Hotel, 2 double beds per room to accommodate up to 4 adults
Cost per Night Per Person: \$55 plus 11% tax
Cost for Meals Per Person: 4 breakfasts=\$30; 2 lunches=\$24; 3 dinners=\$45
Other amenities: registration area, nerve center room, secured storage, no fee for meeting rooms
- 2000: From Hiking Sticks to Silicon Chips; Sherman Lakes YMCA Camp and Conference
Center, Kalamazoo, MI (5 days, 4 nights). CoChairs: Wil Reding, Pete Stobie
Setting: YMCA Camp with forests and ponds surrounding
Room Accommodations: cabins; 5 bunk beds per cabin
Cost per Night per Person: \$39 (includes \$9/person cost for meeting rooms)
Cost per Meal per Person: 4 breakfasts=\$22; 2 lunches=\$15; 3 dinners=\$29.25
Other amenities: registration area, nerve center room, exhibit area, secured storage
- 2001: Wild Spaces are Vital Places; Ramada Inn, LaPorte, IN (4 days, 3 nights). Chair: Laura Gundrum
Setting: somewhat urban
Room Accommodations: hotel; 2 double beds per room for up to 4 adults
Cost per Night per Person: \$59.95 plus tax
Cost per Meal per Person: 4 breakfasts=\$32; 2 lunches=\$18; 2 dinners=\$26 (does not include tax or gratuity)
Other amenities: registration area, exhibit area, nerve center, secured storage, indoor pool
- 2002: Focusing the Flow; Kings Island Resort and Conference Center, Mason, OH. CoChairs: Erin Morris, Susie Edwards
Setting: somewhat urban
Room Accommodations: 2 double beds/room; up to 4 adults
Cost per Night per Person: \$65
Cost per Meal per Person:
Other amenities: registration area, exhibit area, nerve center, hospitality suite, secured storage, indoor pool and recreation
facilities
- 2003: Interpretation at the Crossroads, Ann Arbor Holiday Inn. CoChairs: Julie Champion, Mike George
Setting: urban
- 2004: Rooted in Our Past, Branching to Our Future -50 Years Celebration, Bradford Woods, IN Chair: Vicki Basman

- 2005: Diamonds in the Rough- Mining for Ideas, Polishing Our Skills, Burr Oak State Park, Glouster, Ohio, Co-chairs: Andrea Haslage, Bobbie Sue and Scott Grenerth.
- 2006: The Balancing Act: Interpretation in a Changing Landscape ,Haworth Inn and Conference Center, Hope College, Holland Michigan, Co-Chairs: Travis Williams, Jen wright
- 2007: Back Home Again: Familiar Ground, Fresh Ideas,Pokagon State Park,IN Co-Chairs: Fred Wooley, Scott Beam
- 2008: Oats, Boats, and Dynamite-Sowing the Seeds for an Interpretive Explosion, Cuyahoga Valley National Park, Ohio, Co-Chairs: Foster Brown, Carl Casavecchia

Appendix B. Regional Workshop Timeline

*This time line assumes that the workshop will take place in the Spring (March/ April).

2 years (Spring):

Send formal proposal to Deputy Director for approval

1.5 years (Winter):

Host/ sponsor selection

Committees formed

Facility selection

Logo selection

Theme selection

Promotional activity planning for regional workshop (Skit? Giveaway? Call for presenters)

1 year (Spring)

Promotion presentation @ regional workshop

Call for presenters distributed at regional workshop

March 10 FourThought Deadline: initial article about workshop ready for printing

9 months(mid July):

Request for attendance of NAI Staff or National Board member to NAI National Board Secretary. Send copy of letter to both Executive Director and NAI President.

Mobile workshops identified

Outside presenters confirmed

Keynote speaker confirmed

Sponsors/Donors confirmed

Begin development of budget

June 10 FourThought Deadline; include Call for presenters and workshop update

September 10 FourThought deadline: Workshop update and second call for presenters if needed

6 months (September 25):

Deadline for presenters due to program committee

Budget completed and presented to Deputy Director for approval by Director/Treasurer

Workshop Budget approved by board

Mobile workshop details confirmed

Contact and coordinate auction, awards, ways & means, business mtg., etc.

Finalize base block schedule: i.e. auction, awards, etc.

Design and layout of registration booklet (Mid October)

Approval of registration booklet by Director and Deputy Director (End of October)

Printing of registration booklet (Early November)

Setup of on-line registration

December 10 FourThought deadline: Workshop update, featuring information about keynotes, highlights, promote the workshop! <

5 months(November)

Confirm presenters with letter

Schedule and assign concurrent sessions and post them on the website.

A.V. needs determined

*Registration materials mailed out separately to members (mid November)

3 months

Determine concurrent sessions days and times. Make available to send out.

2months

Meeting room assignments

* Early registration deadline; set by confirming with site as to deadline for lodging numbers---workshop chairs and/or registration chair should NOT be on vacation at this time and should be available to answer questions/calls.

Committee meeting at site if possible

Site and schedule walkthrough with site coordinator

Workshop booklet created and proofed for approval by committee.

1 month

* Regular registration deadline---set by conferring with site as to deadline for lodging/meals numbers; workshop chairs and/or registration chair should NOT be on vacation and should be available to answer questions/calls!

Registration confirmation letters sent

Lodging room assignments made

Committee meeting at site if possible; schedule walkthrough with committee

Final changes with site coordinator

Workshop booklet printed.

3 weeks

Touch base with speakers

Confirm mobile workshop sites/speakers/transportation

Contact Committees one last time for details/changes:

awards

ways & means (regional exhibit)

scholarship and grants ñ auction, grantees

Regional Director (opening, closing , business meeting)

2 weeks

Name tags made

Program packets assembled

Regional Workshop (Spring)

Post Workshop: one week

Thank you letters to presenters

Review evaluations (compile results)

Post Workshop: one month

Committee wrap-up meeting and review

Post Workshop: 1 to 2 months

Tie up financial records

Submit report to Deputy Director

Meeting with upcoming workshop committee if possible

Appendix F. Guidelines for Inviting an NAI staff member or Executive Officer to Attend a Regional Workshop

If you would like to have a staff member or Executive Officer attend your regional or sectional spring workshop, here's what to do:

Region/section responsibilities:

- Submit a written request and concrete dates to the NAI national secretary at the FALL national board meeting
- Cover the cost of registration and lodging/meals for staff/officer while attending.
- Provide registration materials and maps for staff/officer to travel to workshop
- Schedule activity or programs for staff/officer to assist with or provide at workshop. This may include a report on national NAI activities, certification programming, leadership training or development, or a topic within their strength.
- Provide a list of items that staff/officers need to bring for the workshop (linens, bedding, towels, etc.)
- Request NAI exhibit or brochures 2 months in advance of the workshop.

NAI national staff/Executive Officer Responsibilities:

- Executive Committee will review list and check travel availability of officers to workshops. Officers will notify regional director of availability.
- Arrange and fund transportation (through national budget) to attend spring workshop.
- Arrange and cover cost of shipping of NAI national exhibit or brochures if requested.

Reminders:

Only regions/sections that provide firm dates for spring workshops at the FALL board meeting will be able to be considered for travel arrangements by staff/executive officers. (We need to budget for travel and arrange calendars.)

Because of the wide overlap of spring workshop dates, the travel availability of staff/officers is limited. Submitting a request for staff/officers does not guarantee that someone will be able to attend your workshop.

If you have any questions, contact the NAI National Secretary or President.

Appendix N. Sample Letter to Mobile Workshop Site Leaders

USE NAI LOGO STATIONERY

Donor Name
Address
City, State, Zip

Dear _____,

Thank you for agreeing to host a mobile workshop or portion of a mobile workshop for the interpreters, naturalists and educators from Region 4 of the National Association for Interpretation (NAI). These professionals will bring their enthusiasm and excitement for learning along with them when they visit your site! Here are some important details and information:

- We will arrive at your site on (day) at (time). We will be traveling by (bus, carpool, van, etc.) We expect to leave your site no later than (time).
- We have limited the registration for this mobile workshop to (number of participants.)
- Our participants are very hands-on oriented. We encourage you to provide a brief introduction to your site, then spend as much time as possible hiking, exploring and doing. We sometimes get comments that a mobile workshop was "not really mobile." We know you are excited about your site or program and have lots of things to say about it; just be sure to spread those things over the course of the trip and intersperse them between walking or other activities.
- If you will provide the names of the hosts for your site, we will provide workshop packets and nametags for them for the day. We also invite you to have one of your staff join us at the hotel on the morning of the mobile workshops to ride in the (van, bus) and provide a general introduction as we leave the hotel. If this is not possible or practical, let us know. We encourage you and your staff to join us for the entire workshop or for any portion that you can attend. A workshop registration booklet is enclosed with this letter.
- We will be having lunch at your site, as we discussed. We will be bringing box lunches and drinks and can eat at a location of your choosing. We will provide box lunches for your staff who are serving as our hosts. Let us know how many!

Thank you again for hosting a mobile workshop. You will help our NAI members understand the natural and cultural stories of our region through your participation. Please contact me at (phone) or (e-mail) if you have any questions.

Sincerely,

Name

Region 4 Mobile Workshop Chair

Appendix R. Sample Sponsorship Letter and Information

USE NAI LOGO STATIONERY

Donor Name
Address
City, State, Zip

Dear _____,

Region 4 of the National Association for Interpretation (NAI), whose mission is to inspire leadership and excellence to advance natural and cultural interpretation as a profession, will be holding its annual Regional Interpreters Workshop, "A River of Ideas – Focus the Flow", in the Greater Cincinnati area. Over 150 naturalists, interpreters and educators from Ohio, Indiana, Michigan and Ontario will participate in concurrent sessions, mobile workshops and other enrichment activities from March 18 – 22, 2002, at the Kings Island Resort & Conference Center.

The Workshop Committee is searching for a special organization, known throughout the region for its community support, to be a major sponsor for a special dinner cruise, aboard the River Queen. Many of our members' organizations use Kroger stores to purchase food items and other materials to be used in their events and programs.

Should you choose this opportunity, your company will be prominently mentioned in our program and at the dinner cruise. If you would like, you can provide promotional materials for the attendees.

We hope you can be a part of this year's Region 4 Workshop. I will be contacting you in the next couple of weeks to discuss your participation. If you wish to call me for further information, you can reach me at phone _____ or by e-mail at _____.

I look forward to speaking with you in the near future.

Sincerely,

Name

Region 4 Workshop Sponsorship Chair

Appendix S. Tips from the Top: Ideas from Previous Workshop Chairs

E-mail is a great way to communicate with committee members.

Requiring committee reports are prepared for each meeting helped track accomplishments and motivated committees to meet deadlines.

I learned a lot about being flexible with people with different working styles!

Daily meetings of the committee chairs during the conference helped us communicate logistics, changes and keep everyone on the same page.

The Workshop Chairs can't really plan to be conference participants. They need to be free to trouble-shoot, answer questions and keep things on track.

We did everything we could BEFORE the conference---even making lists of announcements.

This helped us avoid last-minute, forgotten issues and changes.

There will be people who want to come for part of a day, part of an evening, etc. that won't fit into your registration categories no matter how many you have! You need to use some discretion in these situations. Work closely with your Registration Chair---one person should make the decisions to be consistent and fair.

Appendix T. Holding Meetings with Results

1. Prepare, Prepare, Prepare
(Meeting objectives, agenda and related documents (distribute at least a week ahead of time), roles, meeting space and treats)
2. Standard Parts of the Agenda
(Housekeeping, information items, discussion items, action items, assignments)
3. Develop Clear Roles
(Chair, facilitator [is prepared, starts/ends on time, records, flexible, positive, protects ideas, does not evaluate, keeps the focus, neutral party])
4. Determine Ground Rules
(Establish responsibility and ownership as a group)
5. Stick to Times
(Start, end, breaks)
6. Hold Check-ins and Check-outs
(Engagement, formative evaluation)
7. Provide a Productive Physical Environment
(Comfortable chairs, good light, food/snacks, good temperature, tactile)
8. Post a "Parking Lot"
(Ideas for later review)
9. Set Agenda for Next Meeting
10. Adjust Within the Meeting Framework
(Site and/or agenda changes)

From *The EE Advocate*

Appendix U. Sample Indemnification (Release) Form for Offsite Sessions

NAI Indemnification Release Form Release Agreement

In consideration of being permitted to participate in field sessions at the (year) Region 4 Interpreters Workshop in and near (town and 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, (list here any sponsoring agencies and significant donors/sponsors), 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 field session site or otherwise sustained while participating in any activity related to the field sessions operated by the (year) Region 4 Interpreters 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 field session sites and all applicable local, state and federal laws.

signed

minor child's name (if applicable)

date