Purpose & Benefit

In 2012, the AWI Education Committee introduced a new direction for its education program to better support AWI chapters and respond to the members’ desire for more education.

The AWI Education Outreach Program is aimed at meeting AWI’s goal of increasing the number of members receiving education programs, while maintaining its high standards, and giving everyone the opportunity to attend these programs regionally.

How Will AWI Chapters Benefit?

- Brings education to a local level
- Subsidizes substantial costs of hosting an education event
- Reduces attendee time and travel costs
- Empowers chapters with professional programs
- Enables chapters to grow membership and audiences for their programs
- A fundraising opportunity for chapters
- Builds on the AWI National – Chapter working relationship

How It Works

AWI National works in conjunction with AWI Chapters to deliver one educational program per year. Chapters may choose from a select list of programs and dates that have been established by the presentation teams. AWI National will cover speaker expenses while the Chapter covers hosting logistics and expenses. Both AWI and AWI Chapters will work together to promote the program. AWI National will provide online Registration Management, collect all attendee registration fees, and will remit the balance of registration revenues to the Chapter after completion of event. See Revised 2016 Policy Statement for details.
Who Does What?

With any education delivery there needs to be clear understanding of who is responsible for what. Below is an general list of responsibility assignment.*

<table>
<thead>
<tr>
<th>AWI Chapter Responsibilities</th>
<th>AWI National Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Program Planning Phase</strong></td>
<td><strong>Program Planning Phase</strong></td>
</tr>
<tr>
<td>- Complete Memorandum of Understanding (MOU) and submit to AWI National</td>
<td>- Provide program dates and presenter availability</td>
</tr>
<tr>
<td>- Complete walk through of online collaboration document of responsibilities</td>
<td>- Provide Chapter with room layout, audio/visual specification, and seating diagram as required by presentation team</td>
</tr>
<tr>
<td>- Select an appropriate host location and provide housing block or lodging recommendation</td>
<td>- Develop web page and registration site</td>
</tr>
<tr>
<td><strong>Marketing Phase</strong></td>
<td><strong>Marketing Phase</strong></td>
</tr>
<tr>
<td>- Include announcement and promo piece in Chapter eBlasts, Newsletters, and Chapter website</td>
<td>- Deliver marketing piece to Chapter</td>
</tr>
<tr>
<td>- Set up calling tree as direct marketing to members and prospects</td>
<td>- Provide a list of active MFG members in area</td>
</tr>
<tr>
<td>- Include the event announcement through communication channels</td>
<td>- Include the event announcement through communication channels</td>
</tr>
<tr>
<td><strong>Financial Management</strong></td>
<td><strong>Financial Management</strong></td>
</tr>
<tr>
<td>- Assume financial responsibility for all costs to secure event venue, food and beverage, and audio/visual requirements as specified for presentation</td>
<td>- Pay travel, meals, lodging, and honorariums for the program presenter(s)</td>
</tr>
<tr>
<td>- Delegate responsibility for registration, fee payments and accounting to AWI National</td>
<td>- Collect all fees associated with event</td>
</tr>
<tr>
<td>- Delegate responsibility for registration, fee payments and accounting to AWI National</td>
<td>- payment by credit card/bank card only</td>
</tr>
<tr>
<td>- Pay travel, meals, lodging, and honorariums for the program presenter(s)</td>
<td>- Upon reconciliation of all items, issue funds of balance to local chapter</td>
</tr>
<tr>
<td><strong>Execution of Program</strong></td>
<td><strong>Execution of Program</strong></td>
</tr>
<tr>
<td>- Assume role of Host to all guests attending</td>
<td>- Prior to event, ship presentation handouts, teaching tools, resources, and evaluations requested by presentation team</td>
</tr>
<tr>
<td>- Provide representation onsite during delivery</td>
<td>- Post Event Follow Up</td>
</tr>
<tr>
<td><strong>Post Event Follow Up</strong></td>
<td><strong>Post Event Follow Up</strong></td>
</tr>
<tr>
<td>- Chapter returns all items to National</td>
<td>- Inventory returned items</td>
</tr>
<tr>
<td>- Submit check request for balance of funds</td>
<td></td>
</tr>
</tbody>
</table>

* Actual assignments with deadline dates are provided in online collaboration document. Document serves as a communication tool for all parties involved.
Available Programming

Project Management Seminar

Project Management
LENGTH: 2 DAYS - MAX. 2 ANNUALLY

Do you react to fires every day? Does the phone control the next hour? Is there frustration at your client/job meetings? COME LEARN SKILLS TO TAKE MORE CONTROL OF YOUR PROJECT!

Project management is supposed to make your life easier. Acquire tools that allow you to find balance between Contractor, Architect, Resources and Manpower. Become the most knowledgeable person about your project.

This recently updated program is presented by industry peers with considerable experience in project management of varying size projects for diverse companies.

Financial Management Seminar

Financial Management
LENGTH: 1 DAY- MAX. 2 ANNUALLY

Spend a day and a half learning to manage your business through your financials. Learn the fundamentals about your financial state-ments and capture meaningful information from the balance sheet and income and cash flow statements. Broaden your understand-ing of financial ratios and methods of accounting. Be introduced to operational accounting and various management tools to include accounts and cost codes, work in progress reports, cost to complete reports, backlog reports, and sales pipeline reports.

This course will bring understanding to financial projections, cash drivers, cash man-agement and financial benchmarking with use of the AWI Cost of Doing Business Survey Report. If time allows, it will also review open book management, contribution margin analysis, estimates and cost tracking, along with banking and surety relationships.
Advanced Estimating Seminar

Advanced Estimating
LENGTH: 2 DAYS - MAX. 2 ANNUALLY

The NEW Advanced Estimating Seminar focuses on equipping attendees with tools and knowledge to improve the efficiency of your estimating department. Lecture, reinforcement laboratory activities and group collaboration provide numerous learning opportunities with practical applications that may have immediate impact.

Think big picture and create solutions to impact desired areas and reinforce strengths. Join us for a great opportunity to enhance perspective, knowledge and skills of your Estimating Team!

Fundamentals of Estimating
LENGTH: 1 DAY (CURRENTLY UNDER CONSTRUCTION)

An updated description will follow the rewrite. We do look forward to relaunching this program in the fall of 2018.
Where to Begin

1. Understand what’s involved with delivering an event. There are several components that may not have thought about at the onset of planning but are an integral part of delivering a successful event. To assist in remembering all that needs to be done, please reference the Planning & Execution Resource Guides. The online collaboration document will list actual dates associated with your specific event.

2. Discuss the opportunity with chapter officers or possibly at your next chapter meeting. Identify your presentation and identify a Project Manager for the event that is willing to devote the additional time. **REMEMBER:** It takes time and planning to execute a successful event.

3. Complete all information and submit your MOU to AWI National education contact. Your event is not secured or guaranteed until this form is received. Presentations are awarded on a first come basis.

Tools for Success

Included on the following pages are the below tools to assist with the planning of your event.

- Event Pre-Planning & Objectives Work Sheet
- 8 Steps to Selecting the Right Site
- Planning Tips
- Glossary of Event Planning Terms
Event Pre-Planning & Objectives Worksheet

Event Name: ____________________________________________________________________________

Description of event: _____________________________________________________________________

Reason for event: _________________________________________________________________________

Association/Corporate objectives: __________________________________________________________
    What do we want to achieve from the meeting?

Who should attend: _______________________________________________________________________
    The nature of the objectives may largely dictate attendance. But don’t overlook others who may
    benefit indirectly.

Attendee expectations: ___________________________________________________________________
    What will the attendees hope to gain?

Suggested marketing themes: _____________________________________________________________
    A theme or common thread helps publicize your goals and generate attendee enthusiasm. Be sure to
    make it memorable — from the first announcement to the final section or adjournment.

Estimated Budget: _______________________________________________________________________
    Be realistic. Propose a budget that will provide the features you need for a successful meeting or semi-
    nar. Figure it on a cost-per-attendee basis.
8 Steps to Selecting the Right Site

Once you set your meeting objectives you’re ready to book your venue. These eight steps will help your choose and reserve the venue that best meets your needs and requirements.

1. Gather historical data.
   a. Attendance
   b. Exhibitors (Supplier members often sponsor events through tabletop exhibits)
   c. Facilities
   d. Room-block pick up
   e. Financial performance

2. Determine physical requirements of meeting.
   a. Select date from program schedule
   b. Attendance
   c. Sleeping rooms
   d. Choosing the Ideal Room (pg 11-12)
   e. Food and beverage events
   f. Exhibits
   g. Choosing audiovisual (see Choosing Audiovisual, pg 13)
   h. Registration table
   i. Additional space needs
   j. Other logistical considerations
   k. Site inspection requirements

3. Attendee interests and expectations.
   a. Attractions
   b. Deterrents

4. Select a location and type of facility.
   a. Travel conveniences
   b. Target audience
   c. University/Community Center
   d. Manufacturing/Supplier member plant
   e. Hotel/Banquet Hall
8 Steps (continued)

5. Prepare meeting specifications and a request for proposal.
   a. Key information about the group
   b. Purpose of event
   c. Information about attendees
   d. Guest room requirements & preferred rate
   e. Meeting room requirements
   f. Food and beverage requirements
   g. Exhibitor requirements
   h. Client point of contact
   i. Other requirements

6. Review and evaluate sites.
   a. Assess space adequacy
   b. Conduct a site inspection (bring a checklist of your requirements)
   c. Request a contract

7. Contract Negotiation (see Tips for Negotiation, pg 11)
   a. Read the contract carefully — confirm all meeting requirements.
   b. Ask questions if you don’t understand.
   c. Ask for changes on anything you don’t agree with.
   d. Ask for concessions that would best benefit you – the bigger the event the bigger the concessions.
      i. Waived Internet
      ii. Waived parking
      iii. Complimentary guest rooms or other meeting space
   e. Ask for condition-based clauses
      i. Complimentary meeting space for x dollars of food & beverage
      ii. Complimentary guest room for x guest rooms sold by group
   f. Do a cost estimate & assess if the site meets budgetary requirements.
      i. Meeting room rental
      ii. Food and beverage (see Food for Thought, pg 12)
      iii. Guest rooms
      iv. Audiovisual
      v. Parking
      vi. Service Charges
      vii. Taxes
   g. Determine method of payment.

8. Select a site.
   a. Secure your site with signature of the contract.
Planning Tips

Tips for Negotiation

The main concern to always consider when reviewing a contract and in your earlier discussions is ... negotiations.

The first tenet of smart bargaining is to know the value of your business. The second is to know how to sell that value to the supplier. The third is to be flexible, and to remember that negotiation is the process of give-and-take.

It is essential to document your agreements in writing.

Use the following checklist as a guide to negotiating with facilities. Let your negotiating partners know up front what your budget is and they can help you come up with a plan to meet it.

- Try to lock meeting room and food and beverage costs as far from your meeting date as possible, or negotiate for a price cap guarantee, if you have to wait.
- Meeting room set-up charges are often negotiable items.
- Audio/visual patch fees (fee for use of house sound) are often waived.
- Give your Audiovisual provider you’re A/V budget up front.
- Using the same meeting room space for different functions throughout the day gives you extra negotiating clout for price breaks.
- Food & Beverage (F&B) is a major area of negotiation. The more food and bigger your F&B function(s), the greater your bargaining ability.
- Flexible menu planning is often key to successful F&B negotiations. Be sure to talk to the chef and/or the F&B/catering director.
- F&B menus usually have set prices, but most catering/food and beverage directors will depart from standard banquet menu items when asked.
- The size of drinks, selection of brands, number of servers and whether or not liquor is sold by the drink, by the bottle, with drink tickets, or at a per-person, per-hour rate, all are negotiable.
- Bartenders’ fees can sometimes be bargained down or waived.
- It may be possible to negotiate for F&B extras like fruit, cheese for break(s) on the banquet menu for little or no charge.
- When negotiating for F&B prices, always factor in taxes and gratuities.
- Purchasing in bulk — coffee by the gallon — beer by the keg — will save money.
- Small details can also be negotiated with the facility — i.e. parking fees, or Internet access

Choosing the Ideal Room

The proper meeting room set-up enhances both the purpose of the meeting and the comfort of your attendees. A few tips to keep in mind:

Before you begin planning room logistics, inquire about room set-up and rental charges. (This should have been done originally in your negotiation process.)

AWI National will assist in selecting the best layout that meets the needs of the speaker(s), the program and the number of attendees. Basic set-up options include:

Classroom

Seating arrangement in which rows of tables face the presenter and each person has a space for writing.

Chevron

Seating arrangement in which chairs are arranged in rows slanted in a V-Shape and separated by a center aisle. They face the head table or speaker.
Conference
Seating arrangement in which individuals face each other around a large conference table.

Hollow Square
Seating arrangement in which individuals are placed in a square (or rectangle) with chairs lining the outside of the table arrangement.

Rounds
Seating arrangement in which individuals are seated at round tables. Size of tables and number of people at each table vary. Works well for group workshop interaction by table and usually used for meal functions. (Preferred for all current deliveries)

U-Shape
Seating arrangement in which individuals are seated at tables set up in the shape of the letter U, with chairs set on one or both sides.

Use of a different arrangement needs to be pre-approved by designated speaker(s).

Diagram - If you can be prepared and have a room diagram for the facility staff to set by, it simplifies set-up and reduces confusion. If not, ask them to provide you one. Be sure to include your room setup specifics (i.e. stage, head table, podium etc.).

Registration Table - Once you have completed the inside of the room, don’t forget your registration desk. Will it be located inside the room or outside?

NOTE: If it is possible to set-up your meeting / seminar room the night before, it will save time. If not, set up that morning and be in the room early enough to check and make sure the room is to your specifications and to place all materials and review your checklist.

Food for Thought
Thoughtfully planned meals, breaks and receptions not only provide welcome comfort from day long meetings/seminars, but also promote interaction and conviviality among attendees.

Please remember that if you use a restaurant or hotel, the catering contact will take care of your menu selections and room set-ups. They will contact you approximately one (1) month before the event. Be prepared with all needs when they contact you.

When working with your catering contact make sure that you ask for all your prices “inclusive,” which includes the per person price with taxes and gratuity – your exact cost of the food & beverage.

Don’t forget that with bars come the charges of a Bartender fee and possibly Cashier fee. These can be negotiated ahead of time.

Be sure to serve hors d’oeuvres and snacks if the reception will not be followed by a dinner. How extensive it is will be decided per your budget.

Types of F&B Functions

• Continental Breakfast - it usually consist of Coffee, Decaf Coffee, Tea, Pastries, and Juices.

• Coffee Break - consists of Coffee, Decaf, Assorted Teas. Done per gallon, not on a per person price. Make sure that the order states that the break is set at least 15 minutes before.

If you have the budget, be creative. For your afternoon break/refresh, consider enhancing it with ice cream, juice bars, guacamole and chips, cookies. Ask your catering manager for ideas.

• Refresh - is when the coffee break is replenished, checked and only a certain amount (usually half) is replaced. This saves you money, by not getting a whole new coffee break.

When you get a refresh (10:00 am is basic for morning and 3:00 pm basic for afternoon) adding mineral waters and sodas to the break allows a choice for the attendees. Usually waters and sodas are priced on consumption (not how many you ordered, but by how many such beverages the group consumed).

• Meals/Lunch/Dinner - Explain to your catering contact what your meal expectations are (easy lunch, buffet, elegant banquet, informal get together) and what your budget and dietary needs are.
• Receptions - Start with noting if a bar is needed, whether it will be a cash bar or host bar. (On a host bar, you pay a per drink charge). You can note what brands of liquor you prefer – house brands (caterer’s choice) or call brands (name brand liquors of your choice).

• Guarantee Policy - clarify the caterer’s guarantee policy (the minimum number of people for which you’ll be charged). Most hotels/restaurants require final guarantees 48 to 72 hours prior to the catered function. If the caterer does not call you at least 48 hours prior — you call them!

Banquet Event Order (BEO)

Once you’ve discussed your choices with your catering contact, they will produce BEOs (Banquet Event Orders) which will list all your food functions by time and room. These orders are what the facility staff will use when preparing your food functions. Here is a checklist of what you need to confirm when you receive them:

1) Check company name, address, phone, fax and contact with e-mail address.
2) Confirm correct day, dates and times for meeting/seminar (per function).
3) Confirm meeting space (that was agreed upon) and charges, if any. (Per your agreement with the facility, make sure that the charge for the room is a one-time charge or a charge for each day).
4) Confirm expected numbers.
5) Confirm/review carefully F&B. (Make sure that they have the right amounts for coffee breaks (per gallon) and that sodas are done “on consumption.”
6) Confirm room set-up instructions and if there is a service charge for set-up.
7) Confirm billing instructions, e.g. account no. stated/direct bill or credit card.
8) Remember that guarantee numbers will be due 48 hours prior to event.

Choosing Audiovisual

The novice meeting planner can easily become overwhelmed by the number of and complexity of audiovisual (A/V) options today. AWI National will provide you with a list of equipment the speaker will need.

Basic equipment, used regularly:
• Screen (8’ x 8’ or 10’ x 10’)
• Podium with microphone
• Lavaliere microphone
• Head table with tabletop podium
• Flipchart with markers
• Chalkboard
• Whiteboard with markers
• Laptop computer
• Projector for laptop computer
• Remote control for computer
• Easel to display meeting sign

• If the A/V is extensive for your program and is working with several presenters, consider scheduling an audiovisual rehearsal so that your presenters can become familiar and comfortable with their equipment.

• Check A/V equipment at least 2 hours in advance of the meeting/seminar function. See that all microphones (mikes) work (podium, lavaliere, table mikes) and that mike cords are long enough and extra taped down, podium light works, main room lighting and that engineering has shown you how to work them; and that no one’s view is obstructed, etc.

• Many planners have found that an A/V emergency kit is helpful in a pinch:

  Kit contains: extra extension cord, electrical or duct tape, screwdriver, pliers, tape measure and other A/V accessories.

Venue & Catering Contacts

Make sure you have contact information on hand for catering, room set-up, audio/visual and other logistics personnel. You should be prepared to reach them quickly if something goes wrong or malfunctions.
Generic Planning & Execution Timeline

How to Create a Successful Event

The following outlines the Chapter’s suggested steps for a successful event. Actual event timeline is collaborative online document.

18 - 16 Weeks

18 - 16 weeks prior to the preferred delivery date is the time to begin planning a successful program. There are lots of arrangements to be made, but the first step is to work with your Directors and/or Program Planning team to decide what kind of event you would like to deliver, the objective of your event and what your budget is. Below are several different ideas to deliver or expand your event.

a) stand-alone education program
b) chapter meeting
c) plant tour
d) networking opportunity
e) golf or other sports outing
f) local chapters of: American Institute of Architects (AIA), Construction Specifications Institute (CSI), American Society of Interior Designers (ASID), International Interior Design Association (IIDA), Architectural Woodwork Manufacturers Association of Canada (AWMAC), etc.
g) co-sponsorship with a member(s) another AWI chapter or Sister Association
h) supplier member tabletop exhibits
i) social activity - lunch and/or reception
j) special invitation (fee discount) for prospective members

While figuring out the type of event, you might also consider the incorporation of a theme. If you would like assistance in developing the right program for your chapter, please contact AWI Education Coordinator, Sue Sicilian [ssicilian@awinet.org].

16 Weeks

1. Research cost and availability of other Speaker(s) or programs for the event.
2. Identify which program you would like to host from the available AWI National offerings.
3. Select date from program schedule.
4. Identify a Project Manager for the event who will be the primary liaison with AWI National for the event.

REQUAED

5. Submit MOU to AWI National.
6. AWI National will contact the identified Project Manager to discuss the parameters of the program and next steps.

15 Weeks
1. AWI National will confirm speaker(s), date & time available to deliver selected program.
2. Finalize full event agenda.
3. With this in mind, work with your Program Planning team to select an appropriate venue for your program. For example, instead of a public facility (hotel, conference center), consider seeking a woodworker, supplier or a local school to allow use of their facility. A local restaurant with a separate “banquet” room may also suffice. Obtain availability and costs for renting space at each facility.
4. Gather confirmation from any event co-sponsors.
5. Begin developing marketing plan. Market the program in as many of the following as possible: e-blasts, incorporation on your chapter website, inclusion in newsletters, announcements at meetings, and direct calling. (AWI National will also market your event, plus post it on its social media and networking sites).

14 Weeks
1. Contact the facilities and service providers to compare total costs of the meeting room, audiovisual equipment, food and beverage, tabletop exhibit tables, and electrical, as well as any other costs.
2. Be certain to confirm maximum counts for exhibit tables and participant seating.
3. Determine tabletop exhibit fees, if any, and establish a member and nonmember rate. Be certain to identify how many registrations are included with the exhibit fees.

13 Weeks
1. Confirm date and meeting room availability with preferred venue, request contract, negotiate and sign.
2. Finalize marketing plan. Don’t forget to use the flyer template provided by AWI National to use the Brand to promote the event.

12 Weeks in Advance
1. AWI National will Open registration.
2. National will track registrations including registrants’ contact information and payment.

11 Weeks in Advance
1. National provides Speaker and other program needs that the chapter will be responsible for providing.
2. Continue marketing.
10 Weeks in Advance
1. Determine what, if any, on-site signage will be needed and begin expediting.
   a. Do you have a chapter banner to be hung?
   b. Is sponsor signage required?
   c. Is directional signage needed?
2. Determine what, if any, registration items should be distributed.
   a. Agenda or Event Program
   b. Badges
   c. Sponsor insert or item
   d. Upcoming news regarding Chapter or National
   e. Drink tickets or other event related items
3. Determine what other registration materials will be needed.
   a. Name badges
   b. On-site registration forms
   c. Cashier items to support collection of registration payment
4. Determine what if any volunteer support is needed on-site
   a. Assistance with registration
   b. Assistance with Exhibitor setup
   c. Audiovisual Liaison
   d. Speaker Liaison
   e. Master of Ceremonies or “Host Speaker” for the Event
   f. Tours staffing
5. Continue marketing.

9 Weeks in Advance
1. Recruit assistance from member volunteers if needed.
2. Order Signage.
3. Continue marketing.

8 Weeks in Advance
1. Make certain any open contracts are signed.
2. Continue to recruit assistance from member volunteers if needed.
3. Determine food and beverage source and needs.
   a. Coffee
   b. Breakfast and/or lunch
   c. Reception
4. Determine Audiovisual source and needs.
   a. Computer
   b. LCD Projector & Screen
   c. Flip Chart & Markers
   d. Sound System
   e. Power for exhibit tables
5. Continue marketing.
7 Weeks in Advance
1. Confirm food and beverage source and deadline for final count.
2. Confirm audiovisual source and deadline for final list of equipment.
3. Place order for needed signage.
4. Continue marketing.

6 Weeks in Advance
1. Finalize food and beverage contract if needed.
2. Finalize audiovisual contract if needed.
3. Send reminder to any out of town attendees that need to book hotel accommodations to do so.
4. Continue marketing.

5 Weeks in Advance
1. Finalize food & beverage selections.
2. Reconfirm audiovisual needs from your speaker(s)
   a. Computer
   b. LCD Projector & Screen
   c. Flip Chart & Markers
   d. Sound System
3. Continue marketing.

4 Weeks in Advance
1. Provide meeting room specifications to venue point of contact and request Banquet Event Orders (BEOs).
   a. seating configuration
   b. estimated attendee counts
   c. estimated tables needed for exhibitors
   d. registration table
   e. easels for signage
   f. podium and or head table
2. Provide final list of audiovisual equipment needed to your service provider.
3. Confirm on-site volunteer support.
4. Continue marketing.

3 Weeks in Advance
1. Review and edit BEOs and make certain all of your meeting needs are listed.
2. Request any changes to BEOs with venue point of contact.
3. Proof and obtain event signage.
4. Begin preparing registration and other event materials.
5. Continue marketing.
2 Weeks in Advance
1. AWI National will close registration.
2. National will send final roster to Chapter.
3. National will send seminar materials based on roster count.
4. Notify speakers of final registration count & onsite point of contact.
5. Finalize BEOs.
6. Plan exhibitor table placement so no competitors are next to each other.

1 Week in Advance
1. Review your check list to make certain nothing has fallen through the cracks.
2. Meet with event volunteers. Verify everyone knows their assignments and answer any questions. Gather everyone’s contact information so you can stay in touch the day of. All volunteers should be asked to arrive no less than 2 hours prior to the delivery.
3. Send confirmation email to your presenter(s) including contact information of who they should call onsite if they should run into any problem or be delayed.
4. Meet with venue staff to review each page or your BEO (or step of your program). Make certain all questions are answered and there are no open items that need decision or direction.
5. Finalize all registration materials and handouts. Make certain to have your registration sign-in sheet alphabetized at the registration table with your participant’s name badge.
6. Gather your speaker biography for introduction & their presentation files.
7. Prepare MC’s Welcome and Conclusion including the announcement of event sponsors and exhibitors.

Day of Event
1. Chapter Liaison should arrive no less than 3 hours prior to the event. Onsite volunteers should also be there 2 hours prior to the event.
2. Bring event checklist and workbook (holding all associated paperwork) with you.
3. Solicit business cards from on-site staff, including cell phone numbers.
4. Inform venue point of contact of your arrival and walk through setup.
5. Inform audiovisual contact of your arrival and review setup requirements.
6. Load presentations to speaker’s computer & test that files open properly.
7. Inform caterer or liaison in charge of food and beverage (if any) of your arrival and walk through agenda.
8. Position your event signage.
9. Set up registration.
10. Greeters (including chapter officers) should be visible and welcome attendees.
11. Make certain your Master of Ceremonies has a copy of their script.
12. When Master of Ceremonies and Presenter(s) arrive, make certain they have everything they need. Then introduce them to your audiovisual contact so they can be properly wired for sound (if needed).
13. Bring your camera and take pictures.
Day after the Event

1. Send a Thank you to your speakers and volunteers.
2. Prepare and send to AWI National all unused seminar materials, evaluation sheets, and a final registration list of all attendees, along with a list of “no shows” and on-site registrants (if any). Include all contact information for each attendee.
3. Within 10 days of receiving materials and sign-in sheet, National will request program accounting and residual revenues to Chapter.

Within One Week after the Event

1. Deliver a list of prospective members (with full contact information from your registration lists) to your chapter Membership Director for recruitment follow-up.
2. Meet with your Planning Committee to critique the event and make notations on “what went right,” “what went wrong,” and “what could be improved.” Share the information with AWI National and keep it in your chapter files for reference in planning and executing your next event.
3. Don’t forget to market the good! Show those who couldn’t make it what they missed. Post your pictures and share a couple testimonials. Make them want to come to the next one.
Glossary of Event Planning Terms

• Advanced Deposit – amount of money paid in advance to secure a room, facility, or service.

• Banquet Event Order (BEO) – a binding document most often used by hotels or other facilities to provide details about specific food and beverage function or event room setup.

• Cash Bar – private room bar setup where guests pay for drinks individually.

• Chapter Liaison – the Chapter’s designated single point of contact person who is authorized to represent the Chapter to AWI National in communications, event planning arrangements, and is typically the event manager during the actual Seminar event.

• Conference Service Coordinator/Manager (CSC/CSM) – primary contact person assigned to an event in a convention center.

• Floor plan – scale plan of the floor area of the venue’s event space; schematic drawing of a function room with specific requirements drawn to scale.

• Food & Beverage (F&B) – the combined selection, ordering and delivery of all food and beverage items from the event venue’s catering/dining services. In most cases, the details of the F&B items are listed on the event’s Banquet Event Order (BEO) document.

• Guarantee – a promise or commitment to provide a minimum amount of sleeping rooms, food & beverage, or other revenues. Usually there is financial liability if the commitment is not met. The final number of persons to be served is usually required at least 48 hours in advance of a food and beverage event.

• Hosted Bar – private room bar setup where the client pays for beverage consumption of their group.

• Letter of Agreement – contract; document outlining proposed services, space, or products which becomes binding upon signature by authorized representatives of both parties. It lists services, food, beverages and so forth.

• Master Account – a record of transactions during an event where the resulting balance is paid directly by the group. May include room, tax, incidentals, food and beverage, audiovisual equipment, décor, etc. Also called master bill.

• Master of Ceremonies (MC) – the Chapter’s representative and spokesperson who stands at the podium, welcomes guests at the event’s beginning, monitors timing for break announcements and delivers general information announcements to the audience during the course of the event. The MC would also deliver closing words of thanks and appreciation to Presenters and guests at the event’s close.

• Memorandum of Understanding (MOU) – a document that expresses mutual accord on an issue between two or more parties. Memoranda of understanding are generally recognized as binding, even if no legal claim could be based on the rights and obligations laid down in them.

• Reception – stand-up social function where beverages and light foods are served. Foods may be presented on buffet tables or passed by servers. May precede a meal function.

• Registration – process by which an individual indicates his/her intent to attend an event/meeting or stay at a property; a method of booking and payment; the process of recording data about an attendee (or exhibitor), sending a confirmation, and creating a badge used on-site.

• Request for Proposal (RFP) – a document that stipulates what specific services the organization wants from an outside contractor and requests a bid to perform such services.

• Service Charge – a mandatory and automatic amount added to standard food and beverage charges, usually used to defray the cost of labor, such as housemen, servers, technicians, etc., and the facility receives a portion of the charge. In return, the guest is relieved of the responsibility of tipping; a fee charged to a client by a travel agent in addition to the commissions paid to him or her by his or her principals.

• Setup – way in which a function space is arranged; erecting displays; installation, or, articles in their assembled conditioned.

• Site Selection - choosing a venue for an event.

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Memorandum of Understanding for AWI Education Outreach

Engagement ___________________________ Chapter

(please fill in official chapter name)

The intent of this Memorandum of Understanding (MOU) is for the Architectural Woodwork Institute (AWI) and the AWI Chapter, stated above, to work collaboratively to provide and deliver AWI National Education programs for the benefit of Chartered AWI Chapters and prospective AWI Members within a Chapter’s geographical territory.

1.0 Definitions

AWI National - The National office of the Architectural Woodwork Institute which represents the association’s membership and industry and is governed by the AWI Board of Directors.

AWI Chartered Chapter - A corporate entity who has met the requirements of the AWI Bylaws, Article IV, and is represented by a Chapter Officer is empowered to enter into a Memorandum of Understanding between the AWI Chapter and AWI National on behalf of the Chapter’s membership.

AWI National Education Program - Any one of the existing named programs published and presented by AWI National, and as listed on the approved title and description of education programs from which a Chapter may make a selection.

2.0 Commencement

The date on which the MOU is executed by a Chapter Officer and accepted at the AWI National Office shall be the official commencement date of this agreement.

3.0 Benefits Conferred to AWI Chapter

3.1 Selection of Education Program

Education program selection and date of presentation will be made and determined on a first reserve, first receive basis after execution of the MOU. AWI National will confirm the availability of the program’s presenter(s) and will communicate and coordinate this to the Chapter representative named in this agreement. Each Chapter may receive one (1) AWI National Education Program within a three-hundred-sixty-five day period.

3.2 Endorsement and Marketing Opportunity

After receiving confirmation from AWI National that the desired program and requested dates will be available for presentation, the Chapter may then promote and market the upcoming program to all Chapter Members, non-Chapter Members and prospective AWI National members within in the Chapter’s geographical area.

3.3 Revenue Sharing

AWI National will participate in revenue sharing with the participating Chapter by collecting registration fees on behalf of the participating Chapter via online registration and retain 10% of all registration revenue as processing fee. Chapter must return all items to AWI National after the event in order to receive registration revenue. Additionally, all credit card fees occurred for the event will be deducted from Chapter revenue.
3.4 Price Schedule: AWI National/Chapter Members-$245/day Non-Members-$350/day. No member discount shall exceed 50% of the Non-Member rate.

4.0 Obligations of Participating Chapter
The participating Chapter agrees to deliver and abide by the following terms as part of this agreement:

4.1 Identify and assign one (1) Chapter Liaison to serve as the Chapter Event Project Manager. This individual is to be responsible for all arrangements with the event facility, food and beverage, seating, tables, audiovisual equipment, accurate attendee lists, and miscellaneous and sundry items as needed for the successful administration and delivery of the AWI education outreach event.

4.2 Contract with and pay for a facility to host the event, contract and pay for all food and beverages served during and after the event, contract and pay for all audio-video equipment as required by presenters equipment list, contract and pay for any miscellaneous and sundry costs required to provide a comfortable and conducive learning environment for the event.

4.3 Actively engage and complete responsibilities per online collaboration document.

4.4 The participating Chapter and AWI National co-market and promote the AWI National/Chapter education event which might include, but is not limited to; email-e-blasts, phone calls, mailings, posting on the AWI National and Chapter websites.

5.0 Obligations of AWI National
AWI National agrees to deliver and abide by the following terms as part of this agreement:

5.1 Education program selection and date of presentation will be made and determined on a first reserve, first receive basis of execution of the MOU. AWI National will confirm the availability of the program’s presenter(s) and will communicate and coordinate this with the identified Chapter Event Project Manager named in this agreement.

5.2 AWI National will provide payment directly to each program’s presenter(s) expenses which include travel, meal, lodging and an honorarium.

5.3 AWI National will provide the participating Chapter with a list of the audio-visual equipment required by the presenter(s) in delivery of the education program.

5.4 AWI National will provide the participating Chapter with a suggested event space lay-out diagram to aid in the selection of an appropriate venue space.

5.5 AWI National will provide the participating AWI Chapter with a PDF that contains promotional information about the Chapter’s education event. The Chapter may re-distribute this unedited PDF, without restriction, in all their marketing outreach initiatives for the event.

5.6 AWI National will provide the participating AWI Chapter with a contact list of regional AWI Members who would be included in all marketing outreach.
5.7 AWI National will provide promotion and marketing support to the participating Chapter by means which might include; email-e-blasts, phone calls, mailings, posting on the AWI National website, AWI website Calendar, and any other means which AWI National deems appropriate.

5.8 AWI National will provide an online web registration URL link with all electronic promotions and will gather registrant’s information on behalf of the Chapter. AWI National will provide the Chapter with registered attendee lists on the collaboration document, updated daily.

5.9 Based upon registered attendee count AWI National will provide and deliver to the designated Chapter point of contact, a supply of printed material for the education presentation.

6.0 Application of Virginia Law
This MOU shall be interpreted and governed exclusively by the laws of the Commonwealth of Virginia.

7.1 Termination
The Memorandum of Understanding expires on December 31 of each year and is not subject to automatic renewal for a similar term.

7.2 This MOU shall automatically terminate if:
7.2.1 Either AWI National or the AWI Chartered participating Chapter loses its legal existence due to, but not limited to, liquidation, termination or dissolution; or

7.2.2 If either party fails to meet the requirements of this agreement, then written notice of such failure if to be made to the other party with the specific request for remedy. If, within five (5) business days of written notice there is no remedy, then the matter will be forwarded to the AWI Education Committee to determine if termination of the MOU is warranted.

Title of Outreach Event Requested: ________________________________

Date of Outreach Event: ________________

Chapter President Signature: ________________________________

Date: ________________

Chapter Project Manager: ________________________________

PM Email: ________________________________

PM Phone: ________________________________

Please submit your signed MOU and direct any questions regarding this document to:

Email: ssicilian@awinet.org        Phone: 571-323-3614        Fax: 571-323-3630
AWI’s Board of Directors has approved policy amendments that modify operations of the AWI Education Outreach Program beginning in 2016. Please review the following policy and procedure guidelines before making arrangements for an AWI Education Outreach Program at your Chapter.

1.0 **Event Registration for all AWI Education Outreach Programs.**
1.1 AWI National will host and manage all Education Outreach Program registrations through the AWI website.

1.2 Registration fees must be paid online at the event registration page at the time of registration for an event. Credit Cards are the only means of payment accepted for online registration.

1.3 AWI Staff will manage all attendee records for your Chapter event. Staff will provide Chapter contacts with a final attendee roster of all paid attendees prior to delivery of your Education Outreach Program.

1.4 On the day of the event, your Chapter event manager is responsible for signing in each Program attendee on the official roster delivered by AWI.

1.5 After the event is complete, the Chapter event manager is responsible for returning the sign-in roster to AWI National.

2.0 **AWI Education Outreach Program Prices Established**

2.1 The Board of Directors has established the following price schedule for AWI Education Outreach Program Deliveries:

<table>
<thead>
<tr>
<th></th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non AWI Members</td>
<td>$350 per delivery day</td>
</tr>
<tr>
<td>AWI Members</td>
<td>$245 per delivery day, which is a 30% Member discount</td>
</tr>
</tbody>
</table>

2.1.1 AWI National cannot make special provisions for variable price points or special discounts that a Chapter may wish to offer. All registration is to be transacted at either the Non-Member OR Member registration prices established by AWI.

2.1.2 ALL event registration and fees must be transacted through the AWI National website. Failure to comply with the established event registration process will be brought to the AWI Board of Directors.

2.2 AWI Chapter may offer Member prices as a courtesy to guests who might not yet be affiliated with AWI National. Courtesy Member price discounts are obtained through event Discount Code provided by AWI National and used during online registration.

2.3 AWI National will provide your Chapter Event manager with an event Discount Code for use at registration.
3.0 Revenue Sharing between AWI National and the host Chapter

3.1 The AWI Board of Directors established a ten percent (10%) administration fee for all online Education Outreach registrations processed through the official registration website.

3.2 Within seven (7) calendar days after your Education Outreach Program delivery is completed, the Chapter is obligated to return the official signed attendee Roster to AWI National.

3.3 Within seven (7) calendar days after receipt of the official signed attendee Roster at National, AWI’s accounting department will issue a check to the Chapter representing ninety (90%) percent of the Chapter’s Registration Fees collected.

3.4 A final Registration Transaction Accounting Report is provided to the Chapter with the remittance check.

4.0 Scheduling a date for your Chapter’s AWI Education Outreach Program

4.1 AWI Education Outreach program delivery is a finite resource. We depend entirely upon the kind and generous donation of volunteer AWI Member contributions of time and expertise as AWI’s only means to deliver industry specific education programs that benefit their fellow AWI Members.

4.2 At the beginning of each year, our Volunteer Presenter Seminar Teams will provide National with a list of dates that their Presentation Team is available over the course of a year. AWI National will provide Chapters with the annual availability date calendar.

4.2 Each Volunteer Presenter Seminar Team has established the number of presentation deliveries and time between each presentation as the basis of availability to present Seminar deliveries to Chapters.

4.3 Chapters are encouraged to select their preferred programs and dates as early as possible in the year. Education Outreach Programs are offered on a first come, first serve basis.

4.4 To be fair to all Education Outreach hosts, Chapters may host one AWI Education Outreach program per calendar year. AWI National will give hosting preference whenever a Chapter did not have an event in the prior year period.

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