



## ***SEMINAR HANDBOOK***

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# THE PIANO TECHNICIANS GUILD, INC.

## SEMINAR HANDBOOK

*“The PTG Annual Convention is unquestionably the highlight of PTG activities; however, many of the members cannot or do not attend. This may be due to traveling distance or a variety of other reasons. Consequently, the regional conventions and seminars are of great importance.”*

George M. Brasche, who was the Regional Convention Director, made this quote in February 1959. This statement still holds true today.

### **PURPOSE**

Whether it is the smallest seminar or the largest convention, the purpose remains the same. We all want to grow professionally. There is so much yet to be learned, and to stop trying would be to become stagnant. We owe it to ourselves and to our clients to become the very best piano technicians that we can be. Would you want less for your piano?

The collective expertise of a convention staff of instructors is overwhelming. Yet here it is for the listening. There is no holding back among members of the Piano Technicians Guild. The sharing of ideas that goes on not only in classes, but also over dinner at a banquet table, during a party, in a hospitality room, or merely in a hallway conversation is unique. We cannot help but grow.

Seminar, workshops and conventions provide an opportunity for piano technicians who are not members of the Piano Technicians Guild to sample this camaraderie and see for themselves the open sharing of ideas among PTG technicians. Hopefully, they will be encouraged to join our organization and grow with us.

The need of having distributors and manufacturers exhibit and display their merchandise is extremely important. They can be a much stronger attraction to nonmembers and members than the average instructor can. Since most piano technicians do not have working relationships with piano manufacturers or dealers, this may be the only chance for them to see such exhibits and talk to manufacturer representatives. Otherwise, the only time they see a tool is in a catalog and they never get a chance to speak to a manufacturer rep one-on-one. This is a strong attraction for non-PTG technicians as well as PTG members and stimulates a strong early interest in future events.

Seminars, workshops and conventions are also social events. The meeting of friends at convention after convention after convention is a very nice happening of which to be a part. Chapters whose members might be somewhat loosely connected become a more closely-knit group after hosting such an event.

Every seminar is different because situations are different, but if you follow the basics in this handbook and add them to your common sense, you should have a successful seminar in every way. Many PTG members, seminar chairs, coordinators and Institute Directors have contributed to this handbook. We thank these people for contributing their knowledge for the benefit of the Piano Technicians Guild.

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## **SECTION I – DESCRIPTION OF EVENTS**

### **REGIONAL CONFERENCE**

A Regional Conference may be held at any time with the exception of the period between May 15 and September 15, and the duration is two to four days. Individual chapters within the region assume hosting and planning responsibilities on a rotating basis. The convention includes classes, a regional meeting, possibly state meetings, technical and tuning examinations, exhibits, a spouse program, social functions, and perhaps a pre- or post-convention tour or trip.

### **STATE CONVENTION/CONFERENCE**

A State Convention may be held at any time with the exception of the period between May 15 and September 15, and the duration is two to four days. The chapters within a state may wish to organize and be coordinated by means of an executive board consisting of officers and representatives from each chapter. A different chapter usually assumes hosting and planning responsibilities each year, possibly according to an established rotation. The convention/conference may include classes, a regional meeting, a state meeting, tuning and technical examinations, exhibits, a spouse program, special functions and perhaps a pre- or post-convention tour or trip.

### **CHAPTER SEMINAR/WORKSHOP**

A chapter-sponsored seminar or workshop may be held at any time and is usually limited to one day, however two-day workshops are possible. An individual chapter hosts this type of meeting and that chapter completes all arrangements. If the meeting involves one instructor speaking or teaching, the event is usually referred to as a seminar. If the event involves hands-on participation, it is usually referred to as a workshop. The seminar/workshop might include a spouse program and, in the case of a two-day event, technical and tuning examinations.

## SECTION II – DESCRIPTIVE DETAILS

### 1. CHOOSING A DATE

Plan a year or more in advance. The date may depend upon the geographic location of the chapter due to possible seasonal weather constraints. Consider holiday weekends and hunting/fishing seasons. A group with many religiously oriented members may wish to eliminate Sunday as a seminar/conference day.

According to PTG Board Policies, the seminar/conference date must fall between September 15 and May 15 to avoid conflicts with the PTG Annual Convention & Institute. The date must be approved by the PTG Vice President, through the appropriate Regional Vice President, whose responsibility it is to coordinate such events to avoid potential conflicts within the region. (Particular emphasis might be placed on the availability of manufacturer representatives as instructors as well as exhibitors.)

Once tentative plans are made for a seminar, conference or workshop, the Seminar Request Form (available from the Regional Vice President or the Home Office) must be completed and submitted to the appropriate RVP for approval.

### 2. PERSONNEL

Chair – The chair, selected by the chapter or governing body, should be an individual who is organized, has supervisory capabilities and works well with people. He/She should also be a member who is dedicated to the purpose, as the job entails hours of planning, travel, correspondence, telephone calls, meetings – all time away from work – to coordinate a successful seminar, conference or workshop. The chair should have already attended other seminars, conferences, workshops and/or conventions and have some knowledge of the procedures involved. Experience with organization and function planning is a big help. Look for a person with an eye for details and much common sense. The chair should have the authority to make decisions on behalf of the event, but be wise enough to seek counsel on important matters if necessary. He/She should report regularly to the group so that everyone is aware of program details.

Committees – The selection of various committees can be best preformed by the chair of the event. Careful thought should be given to choosing dependable people who work well with others, as there may be overlapping of committee responsibilities on occasion. Bear in mind that, while an extensive list of actively working committees can be a good experience, the reality of your particular event situation may be better served by a small, but highly motivated committee that can get things done quickly and efficiently. It is up to the event coordinators and/or chair to make this decision.

Policy Committee: Decisions regarding policy need to be made in the early stages of planning. These decisions will be important to the smooth operation of the event. Following are samples of questions that should be answered.

1. Will we offer reduced registration fees to piano technology students? To people whom cannot attend the entire event?
2. Who will be the invited instructors? How much reimbursement for expenses will we offer?
3. Who should receive reimbursement of expenses? How much will be reimbursed?
4. Should we charge for exhibit space? Should exhibitors receive complimentary registration?
5. To which areas should the event brochure/information be mailed? How often will information be mailed? Where will the promotional information be printed?
6. What is the extent of our insurance coverage? Who will be the carrier?
7. Will examinations be offered? Will tutoring be offered?
8. What is the registration cancellation deadline? Will we refund cancelled registrations? Will there be an "early bird" registration incentive? What will the registration desk hours be? Who will staff the registration desk? Will meal tickets be included in the registration? Will we offer special meals for children or vegetarians? Will there be special rates offered to technicians for separate spouse functions?
9. Will we use door prizes? Who will obtain prizes? How will the prizes be handled? When will they be offered?

Remember that these are only sample questions. Your particular event may call for additions or deletions to this list.

Finance Committee – The logical choice to chair the Finance Committee would be the treasurer (either your chapter treasurer or an appointed event treasurer). The job of the treasurer is very important, as all monies received and expended will go through him/her. The treasurer must be willing to receive all advance registrations, attend special meetings and keep all paperwork and records in clear, detailed order. The treasurer must also be willing to be prompt for the event and to be on-hand at all times at the registration desk.

The treasurer should establish a bank account early for the event with a suggested beginning balance of \$1,000 to \$2,000. This amount will vary according to the nature of the event. The signatures of the event chair and treasurer should be required on all checks written from this account. A substantial amount of money may be handled; therefore bonding the office of treasurer is desirable.

In the case of a smaller scale event with no initial funding, chapter members might pay for registrations early, thereby amassing enough funds to cover initial expenses until other registrations are received.

A budget should be established, taking all areas of expense into consideration:

*Staff Reimbursement*  
*Advertising*  
*Supplies*  
*Postage*  
*Printing*  
*Piano Moving*  
*Operating (phone, copies, etc.)*  
*Catering*  
*Auxiliary or Spouse Program*  
*Equipment Rental*  
*Entertainment*  
*Meeting Room Fees*  
*Transportation*  
*Miscellaneous*

Attach a dollar amount to each category. The total dollar amount budgeted will determine the registration fee. In arriving at this figure, however, the number of complimentary registrations, banquet tickets, etc. given must be taken into consideration. Also important to this calculation is the balance between the number of sponsored or manufacturer-paid instructors and independent or event-reimbursed instructors. (Expenses of sponsored instructors are usually paid by the sponsoring company, thus not creating an additional expense.)

The budget figures should be monitored closely throughout the planning stages as well as through the entire event. The treasurer should submit a financial report following the close of the event.

Publicity Committee – The chair of the Publicity Committee should be an innovative person with an abundance of promotional ideas. This person must develop an aggressive advertising campaign to encourage attendance at the event. The campaign should include designing an attractive, effective brochure to entice recipients to attend the event. Details of the event (name, location, and contact info) should be submitted to the Home Office for placement in the PTG Journal beginning six months prior to the event. (Please note that if the Seminar Approval form has been completed, approved and previously forwarded to the Home Office, the event will automatically appear in the Coming Events section of the magazine beginning with the first available month after receipt.) Approved events are extended one complimentary display ad (one column by two inches deep).

Obtain all publicity possible for PTG. Check with local radio stations for public announcement policies and set up interviews and/or television coverage for classes or other interesting aspects of the event. Contact area newspapers, which may send a photographer and/or reporter or ask that event information be submitted to the paper's office. Have all press information prepared in writing, in advance.

Target area mailing labels may be obtained from the PTG Home Office at a minimal cost. Lists might also be obtained from local dealers or other manufacturers or suppliers. Mail the event brochure to members and nonmembers of the target area to increase coverage. Send information to editors or regional, state and/or chapter newsletters for inclusion in the next available issue.

If your event will be substantial in size, consider obtaining a bulk mail permit. A large volume of mail could potentially offset the cost of the permit. Keep in mind though, that bulk mail is considered third class and therefore, some delay should be expected in delivery. Careful advance planning can help avoid any postal delays.

The Publicity Committee is responsible for making all necessary signs for the event. All signage produced should bear the words "Piano Technicians Guild" rather than just "PTG." Please consult the PTG Graphic Standards Manual for proper PTG name/logo usage. Signs may be simple to highly artistic providing they perform the function for which they were designed.

Examination Committee – The chair of the Examination Committee should be a Certified Tuning Examiner (CTE), preferably from the host chapter. If a testing center for the tuning examination is located near the event site, it is advised to have the exam applicants commute to the test center site rather than have the expense of moving testing pianos to the event site. If exam pianos must be moved to the event site, consult the CTE (or the PTG Tuning Examination Manual) on appropriate pianos.

The technical examinations may be administered on-site by an RPT with the proper assistance. Sleeping rooms may double as exam rooms at the event site.

The CTE in charge as well as the RPT who administers the technical exam should be reimbursed to the same extent as staff instructors (i.e. complimentary registration, banquet ticket and cash to help defray travel/lodging expenses). RPTs who assist with tuning and technical exams are usually extended complimentary registration only.

Property Committee – The chair of the Property Committee must be skilled in moving pianos. Ascertain from the Institute Director, the number and types of pianos and/or parts needed and where they are to be placed. If sponsored instructors require pianos for their classes, they should make arrangements with their local dealers to move in the necessary instruments. Independent instructors who require pianos for their classes will use pianos already on-site. Testing pianos (if necessary) can be obtained from attending companies or from local dealers (who may write off the expense as advertising). Determine what additional equipment instructors or other members of the event staff will need.

Secure the above items and any other needed equipment and arrange for placement at the event site. At the close of the event, arrange for the removal of all equipment and pianos. Be available and responsible for any moving of pianos that may be necessary during the event.

Local piano dealers are usually the best source for securing needed pianos. Contacting more than one dealer may be necessary. A thorough inspection upon receipt of instruments and careful handling is essential – a piano returned to a dealer with damage that was not present upon delivery to the event could potentially do serious harm to the reputation of PTG. Verify insurance coverage of piano movers involved.

Check with the event hotel (or hosting site) to determine the availability of non-piano equipment needed. Make additional arrangements to obtain any other equipment/materials required.

Exhibit Committee – Compile a list of companies that will be exhibiting including the spatial and equipment needs of each. Coordinate details with the hotel staff so that the appropriate (predetermined) display table arrangements are in place when the exhibitors begin to arrive on-site. Exhibitors make a financial commitment when they agree to attend your event. You may find it necessary to exercise a degree of control over this phase of the event by assessing each exhibiting company a nominal fee. Complimentary registration is usually extended to some representatives of each exhibitor. The maximum number of complimentary registrations per booth is usually four. It is recommended that the number of complimentary registrations per booth be determined prior to soliciting exhibitors for the event. Exhibitors are responsible for the purchase of any meal function or special program tickets desired. Members of the Exhibits Committee shall make themselves available to exhibitors for the purpose of assisting with set-up and teardown of exhibits if needed as well as to address concerns/problems encountered by exhibitors during the course of the event. This may include securing a booth while the company representative is temporarily away from the exhibit location. Security services should be obtained either through a professional security agency (for a specified time) or the use of chapter members willing to keep the exhibits secured as needed. The presence of a security service is usually enough to satisfy the liability insurance requirements of the hotel's coverage.

Auxiliary Program Committee – The Auxiliary President or designee should be a part of the planning sessions from the beginning. If there is an active auxiliary group associated with your chapter, the coordination of a program, tour or other activity during the event might well be handled by this group if willing. If no such support is available in your area, a member of the host chapter will need to be appointed to plan such a program if one is desired. (See Auxiliary Program following.)

Transportation/Hospitality Committee – At times there may be a need for a small number of attendees at an event to be provided with transportation to/from the airport, bus/train station, etc. Since the event Chair should be concentrating on arrangements at the event site, a responsible, punctual member of the host chapter should be appointed to take care of any transportation needs.

### **3. SELECTING A SITE**

Visits to potential event sites should be made by a small group of people as soon as possible after the election of the event chair. This group (appearing professional at all times) should include the Chair and three or four key event committee members (which may include spouses involved in planning programs). It is essential that the Chair be the sole contact with the hotel. Too many contacts will inevitably result in misunderstandings and confusion of details. When seeking a location, be sure to have a tentative schedule of the dates, class periods, number and sizes of classrooms needed, meal functions to be planned, possible equipment requirements and a legitimate projection of the number of sleeping rooms and nights to be blocked by the hotel. Keep in mind potential auxiliary and/or spouse activities if applicable. Site possibilities include hotels, motels and institutions such as colleges and universities. Whenever possible, your choice should be easily accessible to travelers.

Considerations important to site selection:

- Sufficient and suitable sleeping rooms?
- Adequate number and convenient layout of classrooms?
- Sufficient space for exhibitors?
- Best possible projected room rate? (Negotiate)
- What complementary rooms are offered by the hotel? (Negotiate)
- Attitude of hotel staff – can you work with them?
- Atmosphere – warm and cordial?
- Accessibility for piano movers?
- Audio-Visual equipment available in-house?
- Sufficient seating for and quality of food service for meal functions?
- Extra food service personnel when needed?
- Easily accessible for visually impaired attendees?
- Breakfast room or breakfast bar open at least one hour prior to classes?

#### **4. DEALING/NEGOTIATING WITH THE HOTEL/EVENT SITE**

Contract – After the site has been selected, attention must be given to working out every detail of the event with your contact person at the chosen facility. It is imperative that every detail be written into a contract that should be signed by both parties. This will help to avoid any confusion or misunderstandings. If the facility has no such document available, formulate your own for this purpose and make sure it is signed by both parties. Some of the items that should be outlined in the contract include:

- Dates and times (including set-up and tear-down)
- Exactly what rooms and open areas will be required (and when) by your group
- List meal functions along with prices and menu choices
- Storage, security and insurance requirements
- A detailed schedule of the entire event (including function times, locations, and necessary equipment, maintenance or food service)
- Details on room set-ups for classes, meal functions, registration area, and exhibits
- Arrangements for ice water service in classrooms, designation of non-smoking areas and requirements for coffee breaks
- Sleeping room rates
- Number and type of complementary rooms as negotiated with the facility. (In most cases, if the hotel will be catering several food functions [auxiliary tea or luncheon, banquet, etc.] as well as being provided with a sleeping room guarantee, classroom areas may be provided at no charge. In addition, a complementary suite may be provided which can be used as a hospitality room and/or a certain number of complementary sleeping rooms which can be used for tutoring, exams, the event Chair, etc.)

It is recommended that the following disclaimer be a part of any contract negotiated:

*“The parties do expressly agree that the Piano Technicians Guild, Inc. is not a party to this contract and shall in no event be responsible for liable for the performance of any of the promises, terms or conditions hereunder. Further, both parties entering the contract agree to hold the Piano Technicians Guild, Inc. harmless from any and all claims, losses or demands, including attorney’s fees, made by third parties arising from or as a result of any act or commission to act or any event or occurrence described in this contract.”*

If you have a good solid event program outlined in writing, the facility representative is usually happy to work with you and give you almost anything you need within reason. Don't be afraid to confirm, question and reconfirm details of the contract. Always meet with the facility representative in person and make sure any changes to the program are made in writing. You may wish to supply the hotel registration desk with a list of exhibitors, instructors, visually impaired attendees, etc. who might benefit from being located close to the classroom areas, asking that these persons be assigned to rooms close by. Since hotel arrangements are made so far in advance of the event and facility personnel may change, an agreement in writing can help keep the event on track should you be faced with a new facility representative.

Meal Functions – Guaranteeing a particular number of meals for a meal function can be tricky. Most facilities operate on a 5% guarantee margin. This means that they will set-up and prepare to serve 5% over the figure the figure you supply. If you give them a figure of 200, then that becomes the minimum for which you will be charged and the facility will prepare to serve a maximum of 210. If the facility sets a guarantee count deadline that is too early for you to provide a realistic figure, then try to negotiate for the right to adjust/update the count to a deadline closer to the actual function. Experience, especially that of a seasoned planner, will be valuable in taking into consideration the likely number of no-show registrants, the number likely leaving prior to the meal function, etc. thereby lowering the figure of meals guaranteed while still being within the 5% margin. If you are making a choice, it is better to guarantee a meal that is not used than to risk the embarrassment of someone not being served. To help alleviate this problem, you might consider requiring an RSVP and/or tickets for meal functions.

Receptions – A reception such as an “Early Bird Party” is usually billed by the hotel on a per person basis. You may want to have the facility supply hors d'oeuvres and wine or punch. You may be able to negotiate with the facility to bring in your own food/drink onto the premises. Policies differ from facility to facility. If the facility supplies a cash bar, there will most likely be a charge for a bartender and possibly a cashier unless a minimum dollar amount in sales is met. By reviewing your pre-registration list, it should be possible to arrive at a reasonable estimate of how many will be on site at the time of the reception. Sometimes a suitable room, a good piano, the simplest of refreshments and a group of friendly piano technicians is all that is needed to have a memorable evening. Any such receptions should be included in the registration fee.

Luncheons – In the case of a one-day event, a luncheon could be included in the registration fee. Guaranteeing a count at such a function should be fairly easy since the entire group would be included. The facility will usually bill on a per person basis. During a convention involving a larger group, you may want to plan a luncheon for spouses or for nonmembers, which would be included in their registration fees. These counts too are rather easy to estimate. When planning an event in a facility whose dining room facilities are already crowded, consider asking the facility to set up a buffet luncheon in a separate room during class each day. Tickets would then be sold separately for each day's luncheon. This plan involves a bit of extra work, but it saves wear and tear on attendees nerves as it eliminates standing in long lines along with other patrons in an inadequate, understaffed hotel dining room.

Banquet – The banquet is usually separate from the registration fee. It could be either a buffet or a served meal. You may wish to determine a separate price for a child’s banquet meal. The count for this function is a bit harder to determine due to the number of complimentary tickets distributed. The banquet might be preceded by a cocktail hour and may or may not offer entertainment. Sometimes, exhibitors are willing to donate items for use as door prizes at the banquet. This function provides an opportunity to acknowledge instructors, exhibitors, host chapter representatives, state officers, national officers and local and national Auxiliary officers. If a head table is not used, reserve one or more tables up front near the microphone for selected participants. It is a good idea to have a written script or order of events including the names of those to be introduced. This will help avoid a lengthy program or missing any introductions. Effort should be made to see that the meal is served on time to avoid running too late into the evening.

Breaks – A thirty-minute break from classes should be provided during the morning and again in the afternoon. Arrange with the hotel to provide refreshments (coffee, tea, etc.) during both breaks. If tables are set up in the exhibit area, it allows attendees to browse through the exhibits and still enjoy refreshments. The hotel can either bill you directly for what is consumed or might set up a “cash & carry” cart. Whenever possible, try to have this service be a part of the registration fee as a matter of convenience to the registrant.

## **5. TECHNICAL PROGRAM**

Your choice of classes and instructors will be a large factor in determining attendance at the event. All phases of any event require careful and thorough planning, but a strong schedule of interesting classes taught by excellent instructors is necessary. Try to include something for everyone.

The Program Chair must be familiar with the programs of previous conventions as well as sensitive to the educational needs of piano technicians. It may be well worth the expense of bringing in well-known instructors from other areas if it will mean increased attendance at the event.

Factory reps are capable and well known and are usually willing to attend local events depending on their schedules. For this reason, it is very important to give ample notice – even a year or more to secure your instructors. The manufacturer will usually sponsor the instructor and pay his/her services and expenses. The host of the event should extend a complimentary registration and banquet ticket as a matter of convenience. This policy should apply not only to manufacturers, but also to smaller companies whose business is supported in large part by piano technicians.

Non-sponsored instructors should receive a complimentary registration and banquet ticket as well payment of hotel expenses. Reimbursement of expenses is permitted, but paying a fee for instructing is not. Your budget will determine what, if anything can be done to cover partial travel expenses of non-sponsored instructors.

Traditionally, class periods are ninety minutes with some two-period class segments. A possible exception might be if your event carries over to a Sunday morning in which case you may wish to reduce the number of classrooms, but extend classes given to two-hour segments.

Confirmation letters including name and length of class, dates and times of presentation(s), comps, financial arrangements, etc. should be sent to instructors. Keep copies of all correspondence for future reference. Include in the confirmation mailing in a form to be completed by the instructor, signed and returned to the seminar chair. This form would request a brief description of the class, a brief background summary of the instructor if desired and a listing of any equipment the instructor might need in the presentation of his class. The equipment list can then be turned over to the Property Committee. Determine what procedure, if any, you might want to use to encourage instructors, particularly sponsored instructors, to return their completed registration forms properly to the event treasurer or designee. Some of them assume that their attendance is known, but what is not usually known is who may accompany them, how many additional banquet tickets they need, proper listing of name and company for badges, etc. In addition, since commitments are made so far in advance, it is possible that by the date of the event the company may be planning to send a different representative. For the convenience of the person in charge of registration, it would be helpful to know of such changes. To simplify procedure, it is best if a non-sponsored instructor settles his own hotel account with the host group issuing a check to cover the costs of the room. That eliminates the complications of telephone expense, restaurant charges, etc. Checks should be prepared in time to give to the instructors before they leave the site of the event.

The event brochures to be mailed to all instructors, officers, exhibitors, etc. should be pulled from the general mailing by the chairman to mark up the form with the appropriate “comps.” These brochures should then be mailed promptly.

Upon applying for a bulk mail permit, you will receive specifications and procedural requirements applicable to your particular post office. It is important to keep in mind that bulk mailing takes somewhat longer than first class mailing and this time difference must be taken into account when planning the dates for mailing your event brochures.

## **6. AUXILIARY PROGRAM**

From “Planning Seminar Activities for the Spouse” by Ginny Russell, Auxiliary Past President.

Inviting and encouraging every spouse to attend seminars with the technician will give the event a better attendance. The following is a list of details and program ideas that can be included in seminar planning:

- Registration – Someone from the local Auxiliary chapter can manage registration for the event. They can mail fliers, print badges, make testing/tutoring reservations and assist at the information desk.
- Hospitality – Auxiliary members can help plan and host an “early bird party” the evening before the seminar begins. They can help plan banquet programs, make centerpieces and take care of small details.
- Thank You Notes – Auxiliary members can write and mail thank you notes to those who helped make your seminar a success.
- Activities – It’s easy to plan activities that will be of interest to every spouse. Technical or business classes are of great interest as many spouses wish to learn as much about their technician’s business as possible. Bookkeeping, business practices and even some piano-related jobs are good topics. Time for these activities should coincide with the class technical class schedule.

Tours to local places of interest are well received. A lunch can be included in the tour price or it can be specified that any meals during the tour are to be at the cost of the attendee. Check with the local chamber of commerce for local tour information and/or resources.

The Auxiliary event chair should pre-determine the financial needs of the program so that the registration cost set will cover all activities. Some events set different prices for children attending the tour, but if the child will occupy a seat and eat the lunch it is acceptable to charge the full tour price.

Be sure to make arrangements for a hospitality room for spouses for the duration of the event. Depending upon the spouse program being planned, this room may need to be large enough to set as a classroom if needed. It should at least be large enough for spouses to gather should they wish not to follow the scheduled program. Supplying the room with refreshments is at the discretion of the Auxiliary planner.

## **7. BROCHURE/PUBLICITY**

The brochure mailed to prospective attendees of your event has great impact on the decision if a technician to attend the event. It should be attractive to the eye, interestingly written, easy to understand, complete and informative. Create the brochure well enough in advance to allow ample proofreading. It should include:

- Date(s), time(s) and location (address, telephone, etc.) of the event.
- A list of instructors and classes with descriptions.
- Social activities.
- Directions to the event site.
- Auxiliary program.
- List of exhibitors.
- Hotel reservation telephone number, convention room rate and deadlines for same.
- Event registration form.
- Application for examinations.
- Where to send registrations and to whom the check should be made payable.
- Regional and state meeting schedule (if any).
- Event chair's name, address and telephone number for informational purposes.

PTG member mailing labels are available for purchase from the Home Office. Member labels are ordered by region(s), states or chapters while names from the nonmember list can only be ordered by state. Have the required information ready before you call to order your labels. Labels can be sent electronically or on self-adhesive label stock.

As the post office will normally require that the brochures be bundled by zip code depending on the type of mailing you do, you may want to ask the Home Office to sort the labels before sending them to you. Consult your local post office for instructions and/or further details on bulk and other mailing options.

The first mailing of brochures can be sent out as early as four months prior to your event, but no later than five to six weeks prior. The second mailing, should you decide to have one, should go out three to four weeks prior to the event. Remember, labels are available from other sources as well (suppliers, etc.) that may reach additional prospects.

## 8. REGISTRATION

Most event planners/coordinators will use a computer spreadsheet or database for entry of registration information. Should you choose to keep handwritten records, the following guidelines will be useful:

Your event registration form (sample attached) should include:

- Date(s) and location of event
- Early registration deadline (if applicable)
- Event coordinator contact information (address, phone, e-mail, etc.)
- Attendee name (and nickname for badge if different)
- Spouse name (if attending)
- Address, city, state, zip and telephone number
- Chapter name and number
- Registration fee amounts (including auxiliary, banquet, etc. as applicable)
- Fees for any additional charge classes (hands-on, etc.)
- Where to send registrations and to whom the check should be made payable.
- Refund and/or cancellation policies

If not noted in your computer database, you might want to create a form on which to track event registrations prior to your first informational mailing. The following information should be included on the form:

- Date registration received
- Attendee name
- Spouse name (if attending)
- Designation: member, nonmember, auxiliary, non-auxiliary
- Banquet ticket(s) purchased
- Additional fee class items (tutoring, hands-on, exams, etc.)
- Amount due
- Total received
- Check/credit card number
- Date badge printed and confirmation sent
- Special participation status (instructor, exhibitor, examiner, officer, etc.)

*(Note: If the child or spouse of a member wishes to attend classes, it is generally accepted that they are allowed to register at the lower member registration fee.)*

Before registrations begin to arrive, determine what information will be included in the attendee registration packet distributed upon arrival. Whatever you decide to use as a packet (envelope, folder, etc.), the following is a list of items you may want to include:

- Nametag (color-coded by category/registration i.e., member, nonmember, etc.)
- Meal function ticket
- Door prize ticket (if applicable)
- Class schedule
- Class change announcements (if any)
- Auxiliary schedule (if applicable)
- Local information (restaurants, etc.)
- Membership information for non-members
- Informational flyer about your next event
- Receipts
- Note paper (optional)

You will find it much easier to have the general information in the packets assembled in advance so whoever is handling registration receipts needs only to add the personal items such as badges, receipts, etc. The completed packets should then be alphabetized for easy access on check-in day.

Set up registration tables in a central location as many registrants return to the registration/information desk periodically with questions, etc. It's a good idea to have the registration desk open a few hours in the afternoon or evening prior to the first day of the event and then at least an hour before classes begin on the remaining days of the event. Once attendees are registered, the desk then serves as an information center for the duration of the event.

## **9. REGIONAL VICE PRESIDENT**

Be sure your RVP is aware of event activities from beginning to end and keep him/her posted. The RVP will usually require a table near the registration area or in the exhibit hall for use in membership recruitment and PTG merchandise sales. It would be a courtesy to have a couple of volunteers available to assist the RVP at the table should the need arise.

Regional meetings are usually held immediately following classes for the day using one of the classrooms. Please include the time and location of this meeting in your class/event schedule. Remember to introduce your RVP at your banquet so all attendees (members and nonmembers) will know who he/she is and that he/she is available for them. RVP expenses are usually funded out of their membership promotion budget or paid out of their own pocket, so it would be appropriate to extend a complimentary registration, banquet ticket and booth. Some events will also reimburse travel and lodging expenses for the RVP.

## **10. HOST RESPONSIBILITIES**

Don't assume that everyone will remember to do his/her job – including yourself! It is recommended that you make a checklist of what needs to be accomplished, who the responsible party is and the deadline for that project – checking them off once completed. Your list might include some of the following: tuning program pianos, hospitality (coffee, donuts, snacks, etc.), signage (making signs, putting up and changing signs, etc.), registrations, brochure, mailings, class monitors, etc. Be sure your list is as complete as possible as the chair of the event cannot be responsible for everything.

Have at least one chapter member in every classroom every period to assist those who need help (including the instructor), checking name badges, etc. Chapter members should be prepared to assist visually impaired attendees as well. A telephone number might be made available for such registrants to call when in need of a guide.

## **11. MEMBERSHIP REBATE CERTIFICATE**

In order to make use of a rebate certificate, the nonmember registration fee should be set at least \$30 higher than the member fee. When a nonmember approaches the membership table/booth, the representative (usually the RVP) will discuss the benefits and advantages of membership and encourage that person to join PTG. The prospective member will be given a membership application, a rebate certificate and other pertinent information. The applicant is eligible for the rebate when the following conditions are met:

- Completed the application at the membership table/booth during the event
- Paid the \$30 application fee (payable to the local chapter)
- Contacted local chapter president and arrange to attend a chapter meeting
- Presented application and fee to chapter president prior to the meeting
- Chapter president completed the rebate certificate upon membership acceptance

The chapter president is responsible for sending the certificate to the responsible party connected to the event at which the certificate was issued. Upon receipt of the completed rebate certificate, the event contact (or treasurer) will issue the rebate to the applicant.

The rebate idea can be used to boost attendance at your event. Be sure to include information on the rebate in your informational mailings. It's a good idea to put an expiration date on the certificate so your books can be closed in a timely manner. Most event planners will design their own certificate, listing the requirements on the reverse.

## **12. ADDITIONAL CONTACT WITH NONMEMBERS**

Your event may provide an opportunity to gather nonmembers together to hear from key PTG officers about the benefits of membership in PTG. You might plan a separate meal function for nonmembers or just schedule a meeting specifically for this purpose. Some event planners have included a nonmember luncheon ticket with the registration fee. The nature of your event will determine whether such a function is practical.

## **13. SUPPLIES AVAILABLE FROM THE PTG HOME OFFICE**

The following are items that may be sent free of charge to a event with an expected attendance of at least 50 registrants. Depending upon the anticipated number at your event, the supplies may be increased or decreased. Supplies must be requested at least six weeks in advance to ensure items are received in time for the event.

- √ Application forms/packets
- √ Examination scoreforms
- √ Reclassification forms
- √ Back Journal issues

## **14. CLOSE OF EVENT**

At the close of your event, please remember to forward the following items to the PTG Home Office:

- √ List of your nonmember attendees (name, address, phone)
- √ List of instructors
- √ A copy of your event program

## EVENT CHECKLIST

### PRELIMINARY RESPONSIBILITIES

- \_\_\_ Select date and site and obtain approval from the PTG Vice President through your RVP.
- \_\_\_ Select event chairman.
- \_\_\_ Formulate budget and determine fees (registration, meal functions, etc.)
- \_\_\_ Complete arrangements with the facility for appropriate rooms and meal functions.
- \_\_\_ Determine class subjects and goals/scope of event.
- \_\_\_ Select/invite qualified instructors.
- \_\_\_ Appoint committees (as applicable):
  - \_\_\_ Examination
  - \_\_\_ Exhibits
  - \_\_\_ Financial
  - \_\_\_ Hospitality and transportation
  - \_\_\_ Policy
  - \_\_\_ Property
  - \_\_\_ Publicity
  - \_\_\_ Spouse Activities (if applicable)
  - \_\_\_ Special (as needed)
- \_\_\_ Meet with each committee as needed to develop specific plans.
- \_\_\_ Design advertising brochure and print.

### PRE-EVENT DAY RESPONSIBILITIES

- \_\_\_ Order mailing labels from the PTG Home Office.
- \_\_\_ Mail brochures to prospective attendees.
- \_\_\_ Confirm arrangements with instructors.
- \_\_\_ Prepare class schedule.
- \_\_\_ Arrange for pianos & equipment needed.
- \_\_\_ Record registrations received.
- \_\_\_ Print function tickets (if applicable).

## ***EVENT CHECKLIST: Pre-Event Day Responsibilities continued***

- \_\_\_ Prepare name badges and registration packets for attendees.
- \_\_\_ Complete meal function arrangements (if applicable - including breaks, etc.).
- \_\_\_ Arrange for on-site event funds to be store in hotel safe.
- \_\_\_ Complete examination arrangements (if applicable).
- \_\_\_ Complete spouse activity arrangements (if applicable).
- \_\_\_ Produce directional/informational signs.
- \_\_\_ Complete accomodation arrangements for visually iimpaired attendees.
- \_\_\_ Arrange additional publicity in the PTG Journal, newsletters, newspaper, etc.
- \_\_\_ Complete final check on work of all committees.
- \_\_\_ Maintain informative contact with RVP.

## **EVENT DAY RESPONSIBILITIES**

- \_\_\_ Arrive at event site as early as possible to oversee final preparations.
- \_\_\_ Set-up and supervise registration (including membership table).
- \_\_\_ Welcome all members and guests as they arrive in the event area.
- \_\_\_ Make sure all assigned responsibilities are being carried out.
- \_\_\_ Be available to see off attendees as they depart and thank them for attending.
- \_\_\_ Supervise the safe removal of pianos and other equipment.

## **POST-EVENT RESPONSIBILITIES**

- \_\_\_ Pay remaining expenses.
- \_\_\_ Remove remaining equipment from site (if necessary).
- \_\_\_ Send thank-you/acknowledgement notes to instructors, committee members, exhibitors, hotel staff and anyone else who contributed to the success of the event.
- \_\_\_ Hold a chapter business meeting to finalize details and present financial report.
- \_\_\_ Submit prospect list, instructor list and program copy to Home Office.

## **PTG BYLAWS, ARTICLE XV - REGIONAL CONFERENCE ORGANIZATIONS (January, 2004)**

### **Section A - Purpose, Name**

1. Regional Conference Organizations, or RCOs, are subordinate bodies under these Bylaws. The purpose of RCOs shall be to implement the mission, objectives and principles set forth in Article I by organizing, managing, and coordinating assemblies of members other than the PTG Annual Convention or chapter meetings.
2. RCOs shall be named corresponding to the assemblies of members they serve, as noted in paragraph C2 below.

### **Section B - Authority**

1. RCOs may operate under their own bylaws, provided these bylaws do not conflict with the PTG Bylaws.
2. RCOs shall have no authority other than that concerning the establishment and funding of their assemblies.

### **Section C - RCO Assemblies**

1. Where more than one (1) chapter exists in a state, province, or similar area, annual assemblies should be held for the primary purposes of:
  - a. Exchanging ideas and working cooperatively for the improvement and expansion of Piano Technicians Guild activities in the area.
  - b. Selecting an official contact person and other leaders to serve until the next such assembly.
2. Assemblies of members, other than PTG Annual Conventions and chapter meetings, may be known as either conferences, conventions or seminars, and designated by their region or regions, state, province, geographic area, district, city, or group of chapters.
3. Such assemblies' dates and programs are subject to approval. The Conferences and Seminars Committee shall assist RCOs, and coordinate dates and programs in such a way that the assemblies will be available at convenient times throughout the country with a minimum of conflict and overlapping. All proposed assemblies, dates and programs shall be submitted to the Regional Vice President, who shall forward the request form to the Vice President for approval.
4. At least one Executive Board member should be present and assist in the program of each such approved assembly.
5. All assemblies shall be self-supporting. If a deficit should occur, the indebtedness shall be the responsibility of the sponsoring organization.

## **PTG BOARD POLICIES - REGIONAL CONFERENCES AND SEMINARS (January, 2004)**

### **A. SEMINAR DATES AND APPROVAL**

#### **1. REQUIREMENTS FOR SEMINAR DATES**

Starting September 1, 1986, seminar approval should be submitted to the Vice President eleven (11) months prior to the event. [85-098, 88-083]

#### **2. APPROVAL DATE FOR SEMINARS**

Seminars will not be approved for dates two months preceeding or following the annual convention. [04-012]

Approval of one-day seminars shall be limited to two per year per chapter. [93-069]

#### **3. SEMINAR APPROVAL**

The PTG Vice President may approve only one state or regional seminar for any given date effective January 23, 1993. State and regional seminars may be approved, at the discretion of the RVP, on the same date as one-day seminars. Any seminar not approved by the PTG Vice President shall be prohibited from making any reference to the Piano Technicians Guild. (One-day seminars may be approved on the same day as state or regional seminars, but the forms are to be submitted for all.) [93-070, 93-146]

### **B. SEMINAR ADVERTISING**

#### **1. SEMINAR COMING EVENTS SECTION**

RVPs are to keep in close touch with their regions and be aware of all proposed seminars and that approval procedure is being followed. [79-034]

Only approved events shall be listed in the Journal or on the PTG website. Journal entries to be listed chronologically as space allows. [04-013]

#### **2. FREE PUBLICITY**

In coming events section only. [79-038]

#### **3. HALF-PRICED AD RATES**

Ad rates for all seminars, local conferences etc., approved at half-price. [79-041]

#### **4. GRATIS DISPLAY AD**

One two-column inches display ad gratis for all seminars, local conventions, etc., for one time only. [79-042]

#### **5. MAXIMUM AD SIZE**

One-half page. [79-042]

### **C. EXAMINATIONS**

It is recommended that seminars and conferences hold a class on conducting examinations and it is the RVPs responsibility to encourage classes in conducting examinations at seminars and regional conferences. [82-099]

### **D. CONTRACTS**

Contracts for seminars with hotels and motels shall be strictly in the name of the sponsoring body and shall not be drawn in the name of the Piano Technicians Guild. The "hold harmless" clause shall be part of each such contract. [86-068]

### **E. MISCELLANEOUS**

PTG Institute action models shall be available upon request for use at seminars. Appropriate packing and shipping procedures shall be followed. [02-083]