Event Planning Guide:

Time Frame	Tasks
Annually between October & December:	❑ Review "Host Kit" sent to you by the "Host Kit Keeper". ❑ Make special note of your Annual Plan and Mentors available to you for your personal planner. ❑ Replace Host Kits with updates received from the "Host Kit Keeper". There is usually a fairly current version available as a download on the website, www.SDRI-pdx.org/Co-op.
12 weeks Before (3 months)	❑ Create Event Plan. ❑ Determine 3 – 5 preferred dates. Make sure these dates do not conflict with other significant events or religious holidays, especially other Co-op classes. Check in with "E-Mail Keeper" for known scheduling conflicts to avoid or identify others hosting a class in your month (from the Annual Plan). When you have a date please let the "E-Mail Keeper" know, so as to help keep the date reserved. ❑ Research and secure training sites for event – Book venue. Preferably locations with free and ample parking, centrally located, and large enough to accommodate estimated class size. Avoid downtown and distant, remote sites if possible. ❑ Determine instructor and contact them directly to check for speaker's availability on proposed date. ❑ Determine minimum or maximum number of students instructor is willing to teach. What do you need to supply? i.e. equipment, handouts, room set-up etc. Do this by phone or E-Mail and be prepared to be a little persistent if needed. ❑ Prepare projected event budget in order to calculate the class fees you need to collect from each student. Decide on your registration fee per person (see Fee Worksheet pg 26) and acceptable forms of payment. Typical fees are $10-50 per student in the form of checks or money orders unless your agency can handle credit card or cash purchases. ❑ We recommend you complete a simple Accreditation Request for AFH Training (pg 22) from the State's Training Credit Committee (TCC) so Adult Foster Care Providers in your class can get continuing education hours. At minimum, attach a copy of your flyer to the Accreditation Request for AFH Training (Form 1510) to reference instructor and class description and indicate "see flyer" on the Form 1510. Until you get final answer announce it as "pending". (visit http://www.oregon.gov/dhs/spd/pages/provtools/training/approval.aspx for more information or E-Mail region.one@multco.us).
8 Weeks Before (2 months)	❑ Create a one-page flyer(template pg 27) using Microsoft Word, including a registration form with all the information for class and send it as attachment to the **"E-Mail Keeper"**, irene.lee@multco.us with a copy to karen.e.markins@multco.us as an attachment. **This should be sent out by the middle of the month approximately two months prior to the date of the class** (For Example: for a June 20TH Class, a flyer should be sent to the l"E-Mail Keeper" around April 15th). Less notice is better than none, but without enough time for saturating publicity circles the class risks cancellation for lack of registered students. E-Mail region.one@multco.us if you are behind schedule. ❑ Decide what your refund policy will be and include it on your flyer. Typical policy is to refund any canceled class by decision of Host Agency or instructor or cancellations by student more than 10 working days ahead of class. Make clear there are no refunds for no-shows or lack of advance notice ❑ Confirm with the "E-Mail Keeper" that your flyer was received. They should promptly check it over for errors, then distribute it to all Co-op member contacts. See for yourself whether the notice comes back to you as part of the group distribution. ❑ Set up a process to collect and process registrations on a detailed roster. Use the sample in the Host Kit (pg28) or design your own to collect additional detail. The designated class "Registrar" within your agency should have a copy of the Co-op member list in order to determine who should be paying double as a non-member. Ask that person (your "Registrar") to additionally make note or tally the approximate number of hours spent doing registration. You will need this information for the final step's Completion Report (pg 33). ❑ Begin to receive registration fees and track their details and accumulation as they come in. Families of DD consumers and DD child or adult foster care providers are always allowed in at member rates. Fees for other non-Co-op members are double those for Co-op members except for OIS and HCR classes that are open to all at member price (Non-members are generally staff of DD agencies who opted not to join the Co-op. If you are not sure of an agency's membership status, check the

8 Weeks Before cont. (2 months)	members list in this Host Kit.) If there is a strong question whether you will receive enough registration to cover costs for a class you may consider holding checks back from processing until you have enough people registered to cover costs. If a class is canceled it may be easier to return checks than to issue refunds. ❑ Call to confirm registration for individual students or (<u>highly recommended</u>) send a letter or postcard to confirm registration. (Irene Lee @ Region 1 has sample postcard format available by E-Mail request and the sample is included in this Host Kit). ❑ Check the website at www.SDRI-pdx.org/Co-op for the class to be posted. The Webmaster uses the "E-Mail Keeper" notices to update the website, about one week after received. If you have seen the E-Mail announcement, but your class posting does not appear on the website after one week, contact the **Website Keeper**. Please remember that everyone has other work priorities and these "official" Co-op duties are volunteer. ❑ Send out flyers to your staff and individual subcontractors as you would other host's class flyers! You may also want to send or E-Mail the flyer to other contacts outside the Co-op such as classroom teachers, non-DD caseworkers, neighbors and others with potential interest in that specific class. It will be your agency's choice to charge double the fee for those type of non-member students in your own class. ❑ Reserve equipment if needed.
2 Weeks Before	❑ Check with the speaker(s) to see if his/her equipment needs are being met. ❑ Send an E-Mail request to the "E-Mail Keeper" irene.lee@multco.us with a copy to karen.e.markins@multco.us to send out a reminder E-Mail for last chance registrations, if needed. Say whether you will or will not accept walk-ins on the day of class or if you want people to call you if they are too late to mail in fees. ❑ Obtain the handouts or an original to make needed sets for the number of people you anticipate being in the class or confirm with the instructor to bring the handouts on the day of class. Photocopies utilizing <u>both</u> sides of the paper are appreciated on "green" principles.
1 Week Before	❑ Assess your registration numbers. If registration is less than the minimum number needed to cover the costs of the class's instructor and other direct costs, the class may need to be cancelled. If there are no significant costs for the instructor but the class does not meet the minimum number set by the instructor, the class may also be canceled. Co-op hosting obligation will be considered met in either of these cases so long as the class was publicized with a reasonable time frame. ❑ Assess any special accommodations that have been requested by registrants and make preparations as needed to accommodate. ❑ NOTE: At <u>least</u> 50% of the capacity for Co-op members outside your own agency but any space remaining a week prior may all be used for the host agency's staff or small subcontractors. ❑ If you must cancel a class, see "Cancellation Procedures" below. ❑ Reconfirm equipment and site logistics with the instructor and training site coordinator. Some instructors may want names of registered students or other information. ❑ Prepare and customize the needed supply of Class Completion Certificates and Evaluation forms. If you write or print the names of the registered students bring a few extra blanks for walk-ins or spelling errors. This will save you hassle, time and postage costs after the class. (Templates pg 31 & 32)
1 Day Before	❑ Establish # of attendees and create nametags (optional). ❑ Send reminder E-Mail to attendees. ❑ Send any updates to relevant volunteers and staff. ❑ Remind staff of any materials that they may need to bring.
Event Day	❑ Arrive early!! ❑ Arrange the room and set up equipment. Brew coffee at least 30 minutes before class. ❑ Ensure requested special accommodations have been made. ❑ Lay out simple snacks and beverages (coffee, tea, cookies, crackers, muffins, fruit, etc.). Some sites i.e. East Portland Police Precinct, have their own coffeemaker to use, but you will always need to bring in cups, napkins and other items, and <u>clean up afterward</u>. ❑ Set up registration. Be sure it is ready no later than 30 minutes prior to the start of your event. Ask each person to sign in as they arrive. If you are accepting walk-ins, be prepared to accept registration fees at that time. Give handouts and evaluation forms according to instructor's preference. ❑ Run through equipment with speaker (if needed).

Event Day cont.	❑ Have instructor sign previously prepared Certificates of Completion. Do not hand out any certificates until the end of class except in unusual or prearranged circumstances. If people miss a half-hour of class or more please make note on their individual certificate of the reduced time and your initials. ❑ At the appointed starting time, introduce the instructor warmly and explain any logistics about restrooms, parking, etc. to the class. You may want to explain the Co-op's purpose and function briefly as well and direct students to future classes. In some cases there may be an upcoming topic that relates to the day's topic you may choose to promote. (Such as Autism 2 to an Autism 1 class).
Event Day (after)	❑ Thank everyone for coming, thank instructor publically and lead a round of applause for instructor. ❑ Collect Evaluations and hand out Completion Certificates as people leave. ❑ Offer the instructor a chance to read over Evaluations (during clean up). ❑ Clean up the classroom; return chairs and table to their prescribed formation, clean out coffeepots, etc.
Within 2 Weeks Post Event	❑ <u>Pay the trainer</u> the agreed fee, if any, plus any other agreed upon charges for space, copies or equipment. ❑ Tally time spent and costs and money received for this class to include in the Completion Report (pg 33). ❑ Submit copy the Completion Report, final Roster, and a copy of evaluations and handouts to the "Paper Keeper". This information will be filed and kept for future reference or to establish in-kind contribution for any future grant proposals. (This may be submitted by E-Mail if that works best). ❑ Tell us about your experience. Pass along anything you learned, advice for the future, etc. E-Mail responses to region.one@multco.us.

Congratulations, you're DONE! Now you know how the next time you are assigned to host (or choose to host an <u>additional</u> class)! You can designate any fees you collected, in excess of direct costs, to enhance or help support other training activities for your own agency.

Cancelation Procedures

If a class must be cancelled, immediately:
- Contact EVERY registered student (or their agency contact)
- E-Mail the "E-Mail Keeper" ASAP - they will send out a cancellation announcement.
- We also suggest post a sign at the classroom site to inform any last minute walk-ins or anyone you were unable to reach by phone or E-Mail about the cancellation.

Disability Accommodations

Co-op Hosts will make disability accommodations whenever possible.
Class participants must request accommodations 2 weeks in advance or as soon as possible. Accommodations may include: larger font handouts; reserving a seat on an aisle, closer to the sound output or visual displays; allowing an aide or interpreter into the class.

The hosting agency will inform the participant when a requested accommodation cannot be met. Then the participant or his/ her employer should attempt to meet the accommodation for that individual.

Class Approval for Foster Care Training Hours Credit

Foster Care Providers now need their training hours & classes to be approved by the state office of Seniors and People with Disabilities Adult Foster Care Training Accreditation Committee. A copy of the "Request for AFH Training Credit form" (SDS 1510) is provided in the Host Kit.

Completing this form for Foster Care Providers attending your class and submitting it to SPD by E-Mail as listed on the form is not mandatory, but a very helpful service you can provide. Foster Care Providers registering may inquire if the class has been approved to decide whether they will attend.