

How to Organize a Chapter Seminar

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Introduction: Myself as former president, Kathy Maxwell from the Home Office; Jack Wyatt-grandfather of the Associate Seminar; my first one at Waco; and Home office options- EPOR/Website tools.

[Specific instructions that apply only to a One-Day Seminar are underlined; Two-Day are *italicized*.]

Step by Step Instructions for One-Day or Two-Day Seminars

- A. **How big is your Chapter(s):** Will this be done by one or more chapters? If it is one, assess how many members will be willing to assist in the organization and day-of help. *You would need at least 8 RPTs to help with the Technical skill stations, and one more for possible Tuning. In the case of an Associate Seminar, RPTs are vital. If there aren't 8 who are available to help, it's still possible to "borrow" an RPT or more from another chapter—perhaps a friend or colleague who can assist on the day of and doesn't mind some travel. If there are two or more chapters who are involved, then you have a bigger pool of RPTs to utilize.* Which chapters are involved: Are you in a metropolitan area where there is more than one chapter? You could split up the organizational duties, finances, and assistants. If you are a single chapter, hopefully it's a large enough chapter where you've got lots of hands to help, and *quite a few RPTs to assist in the skills section.*
- B. **Select a Presenter:** Who do you have in mind to bring to your chapter area? What do you want them to teach? How long would you like them to speak on one topic or another? Four 90-minute sessions with lunch and breaks work well, but be creative if the presenter needs a different option. They will likely want an honorarium and all expenses paid. Discuss this with your chapter members to see what you can afford. This may be a "gift" from the chapter to the members, or you can discuss charging admission for the seminar.
- C. **Select a Venue:** What kind of place is appropriate? Depending on the presentation, a dealer's work area/shop; a library's public rooms for reserve; a private piano shop; a school or university space; any place with room to spread out. Is the venue free? Is there a contract to sign? What are the liabilities? Who signs it? If there is a cost, can the chapter cover the cost initially out of its funds? Or can it be split between two or more chapters? The cost of the venue is usually covered in the paying attendees. Are there tuning areas available on site? (Tuning areas are rooms that can be closed off with a door, and hopefully away from the madding crowd.) This allows options for either tuning tutoring, the One Note Tuning Exam, or a customized mock tuning exam. There needs to be enough room for 8 repair stations, 2 regulation stations, and food and beverage area. If there is a small gathering/couch area, all the better. It will likely be a classroom-style situation, but not always. Determine if shop space and tools are needed. Determine if noise from power tools is a factor/problem for the venue. Classroom style, needing a projector and screen?
 - a. When you choose the location, what are the travel needs? Sometimes people will come from other states for a good *Associate Seminar*, so you need to provide attendees information for hotel options, and possibly food options nearby; also driving directions.
 - b. *Hotels in the area- call or search the internet to find and provide a few price ranges, but try to reserve a small room block of 10 or more rooms at one that is most convenient to the venue (and nice). Call hotel or sales mgr. Finding one with a breakfast and free parking included is optimal.*
 - c. Airport: some Associates or the presenter will fly in for your event, so notate the nearest airport.
- D. **Choose a Date:** When is convenient for all? Spring or fall work very well (optional: check with H.O. Kathy to make sure nothing else is scheduled in the same area at the same time; they may publish details for you.)

E. **How much to Charge \$:** This is entirely up to you, *but we try to be a little cheaper than the EPOR because we are not having to fly in examiners from all over the country.* Expenses need to be covered if at all possible, but there is also lots of opportunity for *profit* for the chapters. **Kathy**
Members or Non-members Allowed?: Decide what is best for your chapter and area. This can be an occasion for any tech in the area to pay \$\$ to your chapter to strengthen their skills. Usually non-members will pay more. Budget/Expenses: Hotel & Travel for Presenter/*Examiner(s)*; Venue; Food; Misc.

F. **Event Coordinator(s):** If you can establish one or more members (RPTs or Associates) to oversee the process and handle the communiqué with the presenter, venue, hotel, catering, etc., all the better, but hopefully there will be lots of participation from chapter members, and you can divvy out jobs as needed. There also needs to be a MASTER LIST of paid attendees, arrival info if needed;(do they need a ride from and to the airport?), and a Master List of the *participating RPTs and their times of volunteering*, also any details of the presenter's needs.

G. **Details of Presenter's Needs:**

1. Travel: Flying or driving; ask if you need to book a flight for them, or if they prefer to do it themselves. If they are driving, make sure to cover their mileage costs or gas (usually not both).

2. Lodging: Locate a nice hotel near the venue, near a chapter member, OR if the presenter is game, they may even elect to stay with a willing chapter member, thereby saving some cost. It's worth asking.

3. Special Equipment:

a. If the presenter's subject is a power point presentation, then inquire about screen, projector, sound equipment if necessary—the venue may have all, or the presenter may bring some or all themselves. Otherwise, a chapter member may have the equipment, or you may have to rent it. Find out what they need.

b. If the presentation is technical in nature, find out if they need special tools that they cannot travel with, power tools, large shop space, etc.

4. Honorarium: This is up to your chapter to decide and offer to the presenter.

5. Time needed for presentation: Check what blocks of time they like to present in and incorporate.

6. Printing/Handouts: Find out if the presenter wants to give handouts to the attendees, ask if printing is needed on your end, or if it's covered on theirs.

H. **10 stations for Technical Skills:** Regulation: grand regulation, vertical regulation Repair: key rebushing, string replacement, string splicing, hitch loop tying, hammer shank replacement, hammer shaping, flange rebushing, flange repinning.

**Quite often, all of the stringing skills can happen next to each other; also the same for flange rebushing and repinning. This saves a little room, if space is tight. If the space is sprawling and crowded, then a handdrawn map beforehand to decide where each station is going, is very helpful.*

I. **Tuning:** Tutoring and/or Mock Exams --Is there room for tuning tutoring, or a one-note tuning exam? This is helpful to offer if at all possible; quite often people are interested in this aspect only and will pay extra for individual tutoring. The charge for the tutoring needs to be decided, and is usually given straight to the tutor, but can be negotiated. The time slots are variable, but 30, 45, or 60 min. slots can be considered.

J. **Written Exam:** It is best to offer this option as well; many will be interested; just find an RPT who will give it, and make the announcement at the beginning of the day when it will be offered. It needs to be 90 minutes long, and possibly at the end of the day, or on the second day. ***BE SURE TO HAVE MEMBER APPLICATIONS AVAILABLE** if you are opening this up to non-members. Don't forget to check for current membership well before the exam. This may be accomplished with the website. **Kathy**

K. **Question and Answer Session:** At the end of the structured station day, take a break, but then have an hour or so of general Q&A time, for the Associates to ask any questions they have—about the skills, about the exams, etc. A panel of RPTs and/or examiners is best. Sometimes if there is an RPT in training as an examiner, that will suffice to answer exam questions. This panel is a great idea for a couple of reasons: 1. It's an informal opportunity for the Associates to ask any burning questions they've had 2. It lends authority to the RPTs who have been helping all day, but also makes them very approachable later. Also, at this time, it is an excellent idea to thank the venue for hosting, if they're present.

- L. **Communication:** Kathy E-blasts/Flyers for Chapters; Information should include:
- Announcement Forms – (show examples)* Include: Title, Presenter name, chapter hosts, date and day(s), draws (bullet point reasons they should come); cost which includes lunch, etc.; location, hours during the day, *Q & A session*; *BRING THEIR OWN TOOLS*, coordinator(s) contact info
 - Registration Forms – (show example)* include the date, the location, name-address-phone-email-chapter name-chapter #-region. Cost (member/non); *tuning tutoring offer and how much*; *Written Exam – yes/no*; *Technical Exam - yes/no*; name and mailing address of Registrar
 - E-blasts*: this can be handled by a member of your chapter, or by Kathy at the home office, and should include all of the information listed below for the Announcement Forms. Also you need to determine how many and the timing.
- M. **Gathering Help for the Two-Day:**
- Call RPTs for their involvement – this is a necessary step to call RPTs and examiners and personally invite them to participate. This telephone call goes a long way to recruiting assistance; they will need to volunteer their time to give back to the chapter, but they will have all of the food and beverages that the attendees receive. Also during the telephone call, find out which technical skill they are comfortable demonstrating. There are people who are good at all of the skills, including Grand and Vert. regulation, but there are some who are only comfortable with certain ones. You want them taught a certain way, so make sure they know the “accepted” way to teach the skills. Most do. If you have a handful of RPTs who are comfortable teaching at any station, they are valuable! I call them “floaters” because I can insert them anywhere I need them, and they can shift easily from one station to another.*
 - Make lists of who is participating and schedules for them.*
 - The RPTs can serve in 2 hour, 4 hour, or 8 hour blocks of time, depending on the “pool” size.*
 - It’s important while on the call to ask the RPTs if they have any jigs they can lend or bring with them. Some will lend a jig, even if they cannot participate that day. Advise them to label their jigs clearly. If they do serve a certain station, could they bring the supplies for that task?*
- N. **Equipment:** *It is common to beg and borrow the jigs needed for the skill stations. Many chapters own their own jigs for practice or exams. If your chapter is lacking any jigs, you can often borrow them from a nearby chapter, or the home office may even be able to ship what is missing to you for a cost. Kathy Also, some of the repair jigs can be homemade. Such as, for the hammer shaping portion, any old upright action will do. If you don’t have any stringing jigs, quite often someone in your chapter may have such a jig in their shop, or can make one for the occasion! Take them up on this! Make sure there are ample chairs (folding is fine) for any number of people to be able to sit down if needed.*
- O. **Supplies:** *Supplies are needed and usually donated by the assisting RPTs; these supplies include: regulation and repair tools, bushing cloth, old hammers (for broken shanks), center pins, light gauge music wire, punchings, cauls, upright hammers for shaping, glue, tuning pins, hammer shank extractors, hammers and flanges for rebushing/repinning*
- P. **Create a Schedule:** *There needs to be a schedule for each day, either electronic or on paper; this needs to include when breakfast items are available, when sessions or stations begin (usually 90 minute blocks), 15-30 min. breaks with munchies, lunch, Q&A session, when the Written Exam will be offered, etc. (very similar to our convention schedule) For the Two-Day Associate seminar, you have the option of requiring everyone to shift to another station at certain intervals, or you may let them wander as they wish, to address their own needs.*
- Q. **Signage for Venue:** *Event title sign, chapter host/venue sign, registration sign, directional signs (stations, restrooms, tuning room, etc.), station title signs, and daily schedule on poster board (large for quick reading); find out from the venue if you can put the signage on the wall with tape, or you need an easel or music stand to support the signs; many directional signs are helpful*

R. Food and Drinks:

- h. Provide breakfast items each day – muffins, fruit, breakfast tacos, OJ, hot tea, coffee, etc.
- i. Provide lunch for one day – this needs to be reserved in advance for either pick up or catering. Decide budget for the lunch, depending on number of participants (include all attendees, assistants, and organizers). Could be sandwiches, wraps, burgers, subs, etc.
- j. Provide light munchies during the breaks if you choose, including coffee, soft drinks, tea, or water, maybe chips, popcorn, candy, leftover breakfast items, ice, ice chest, cups, plates, napkins, etc.
- k. As a nice option, find a local restaurant for dinner for all to join; it should be individual-pay and expressed in advance (unless your chapter budget is large); obviously needs to be a restaurant that can take a large group, but not too noisy! *This idea is a great way for the attendees to relax and get to know their RPT helpers.* Think camaraderie. This is a very valuable opportunity.

S. Master List: There needs to be a master list of *which chapter members are working which stations and when*, but you should also involve the Associates of your chapter to assist before the event. Can they pick up office items? Can they make the signage? Can they pick up breakfast items or lunch at a designated time? Establish who will help with these errands and when. Have the coordinator(s) call, email, or text a reminder the day before. Remember to encourage all errand-ers to collect and submit all receipts for reimbursement. These expenses should be reimbursed as soon as possible by the chapter, but eventually by the event. Assign who is transporting the presenter from and to the airport + hotel. This is also a good place to decide who will make any welcoming or informational announcements.

T. Set Up/Breakdown: Day-of or day before? It needs to be established with the venue when you are welcome to set up for the presenter or the stations. If you can get in the day before without being charged extra, all the better; *it should only take 1.5 hours or less for setting everything up for about three people helping*. If set up cannot be done until the day of, you'll need to adjust the start time accordingly for the volunteers. (Many hands make light work!) Don't forget about breakdown! Who will stay to the end?

U. Establish Registrar: Have a person assigned to receive all monies, set up and man a registration table area, able to take cash, checks, and cc if possible on the day of. Also this is where all of the office supplies will be; NAME TAGS, markers, tape, scissors, clipboard, extension cords, printer paper, etc. It's usually the Treasurer who serves; also have them bring the chapter checkbook for onsite reimbursements

V. Exams: *It is entirely possible (and frankly awesome) if you can offer the Technical exam! This attracts attendees in a big way. If there is a TEC in your area, employ their services if at all possible. The exam is usually offered on the second day of the seminar, giving the Associates time to practice any and all skills on the first day. Usually there is only room for two examinees.*

W. Evaluation: Some chapters like to send an evaluation, either paper or electronic, to the attendees. You could either create one with custom questions that you print and pass out on the final day, or you could create one in Survey Monkey or similar websites very easily. This may help you decide if the event is repeatable.

X. Insurance: It may be necessary to make sure your chapter has insurance in case of any damage to the venue, attendees, loss of tools, broken jigs, etc. Ask me how I know!

Home Office Resources: Kathy Maxwell

Website tools: Timelines, lists, flyer ideas, registration form ideas, e-blasts