Society of PM Professionals
***Of* GREATER VANCOUVER**

Seminar Management Manual

Revision 8
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Society of PM Professionals

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Document Control

Version Control

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Acronyms and Abbreviations

Abbreviation	Meaning
PD	Professional Development
PDU	Professional Development Units. These are the means whereby the PMI measures units of activity for continuing accreditation.
PM	Project Manager *or* Project Management
PMBOK	Project Management Body of Knowledge
PMI	Project Management Institute. See www.pmi.org
PMP	Project Management Professional

Document Policy

1. The masculine gender is used exclusively throughout this document. As is standard in formal English, it refers in practice to both men and women who might perform the tasks described.
2. Lists are punctuated with the Oxford or serial comma; thus “red, white, and blue” is the accepted format for lists and not “red, white and blue”.

Introduction

This manual contains a set of guidelines for the activities necessary for planning and running a successful seminar. It also stipulates the detailed requirements for procedures and conduct pertaining to a professional development seminar sponsored by the Society. It is issued for the use of the Officers of the Society and the Project Managers (PMs) of professional development seminars. The PM should issue the manual to key members of the seminar management teams.

The manual is updated by the Registrar of the Society and is posted on the Society website.
See: http://www.vcn.bc.ca/pmprof.
In this manual, there are references to templates for the messages and documents produced in the course of planning and conducting a seminar. These templates are available for download from the Society website.
See: http://www.vcn.bc.ca/pmrof
See the page: “How to Join & Participate>Organize & Deliver a Seminar”

The Registrar may be contacted at any time for assistance with specific items. The contact information for the Officers of the Society is posted on the website.
See: http://www.vcn.bc.ca/pmrof
See the page: “Officers of the Society”

Requirements and Guidelines

The stipulations in this manual which are identified as “requirements” are mandatory. All requirements are expressed in statements containing “shall” or “must”, or are explicitly identified as requirements.

In addition, there are statements offered as guidelines. The guidelines include suggestions, tips, and reports on experience which should be given consideration, but are not mandatory. The guidelines are expressed in statements containing “should”, “will”, “may”, or like terms.

Management of the Manual Content:

All recipients of the manual are invited to submit suggestions for changes to the manual based on their experience in managing seminars. Suggestions, queries and comments should be sent to the Registrar of the Society, or submitted via the completion report for a seminar. All suggestions will be reviewed for incorporation into future versions of the manual. It is intended that the manual become a continually up-dated “lessons-learned” document.

The Nature of the Services Provided for Seminars

Volunteer Service

Serving as an officer or as a committee member for a project management organization is a professional service. The activity is classified by the PMI under "Category E, Voluntary Service, Qualifying Activities for Professional Development Units". This means that the Officers of the Society, the Project Managers and team members for PD seminars are acting in a professional capacity. It is expected that they perform their roles with the same diligence and devotion to working towards a successful outcome as would apply to any other professional assignment. Volunteer work for the Society has the same priority as any other professional work, paid or unpaid. The Client for professional services is the Society.

Professional Duty

If an Officer or seminar team member finds that he is no longer able, for personal reasons, to devote the time and energy necessary to providing services according to a professional standard, then he should resign from the role rather than provide inadequate services. Being busy with employment or paid assignments is not an excuse.

Seminar Management

The Role of the Project Manager

Every seminar is a separately managed event. The PM has complete responsibility for event delivery from start to finish: from booking the facility and recruiting the presenters to collecting any outstanding fees and issuing the evaluation and completion reports. The PM is the key player. If there is no PM, there is no seminar.

The President of the Society is the Executive Sponsor of the event, with a responsibility for conveying the requirements of the Society, and for monitoring the plans and performance of the PM to assure compliance with the requirements. The PM is expected to keep the President informed of plans, contractual commitments, and status of preparations.

Each seminar is a stand-alone venture and the policy is to budget to a break-even point. The PM is charged with financial responsibility for the seminar. This does not mean that the PM is personally liable for a deficit – that liability is shared by the members of the Society. However, the PM takes professional responsibility for diligent financial management of seminar funds as the agent and trustee of the Society.

The PM should make use of the checklist in Appendix I to ensure that all necessary tasks are completed.

Seminar Dates
Seminars are typically scheduled for the fourth Wednesday of the month. However, there is nothing special about the date, Wednesdays work well for most Society members. On occasion, seminars have been scheduled on Tuesdays and Thursdays.

The duties of the PM
- planning the event; establishing the time table for preparation activities, budget, and contingency arrangements
- structuring the technical program, the agenda for the day, and the recruiting of presenters, workshop organizers, and workshop facilitators
- chairing and directing the proceedings of the event
- arranging for all physical facilities, resources and the seminar binder
- preparing publicity information for e-mail broadcasts
- enrolling and recording registrations, administering waiting lists and cancellations
- signing-in registrants and collecting fees at the event, collecting payments from no-shows
- collecting and delivering the archival record documents for the seminar, which consists of the softcopy for the seminar binder, the presentation files, the author permissions, and workshop outputs, if these are recorded

- preparing and distributing the seminar evaluation report and the seminar completion report

The PM should assemble a team of volunteers to whom the performance of some or all of these duties can be assigned.

The first tasks for the PM are:

- setting the budget
- establishing the seminar fee; this means first setting the policy on complimentary registrations for presenters and the planning for the catering
- identifying a full complement of presenters
- assigning all roles to team members if this has not already been done; if necessary, recruiting additional team members in the first publicity notice
- obtaining approval for the budget and fee from the President and the Secretary Treasurer, the secretary-Treasurer may require an allowance in the fee for the general expenses of the Society, or for making up deficits from previous seminars
- preparing a description of the seminar technical program for the first publicity notice, which is an e-mail broadcast to publicize the event and to invite registrations
- identifying a team member to serve as Registration Manger; registrations will commence immediately upon publication of the seminar notice, therefore the registration process should already in place

Other Management Team Roles

A workshop to plan the program for the subsequent year is held as part of the November seminar each year. In the workshop, core groups of presenters, workshop leaders, project managers, and team members for a program of four or five seminars are identified.

There is room in the calendar for additional seminars. Those interested in initiating and managing additional seminars are encouraged to do so.

The Society Officers have a list of people who have indicated a willingness to serve as volunteers. The PM can recruit additional team members from this list. Once registrations are received, additional team members can be drafted from among those who plan to attend.

Technical Program Manager –
Often the PM retains this role.
The duties of the Technical Program Manager are:

- recruiting additional technical presenters, panellists, workshop facilitators, and discussion leaders
- organizing the technical program agenda
- obtaining requirements for equipment and supplies from presenters and workshop leaders
- chairing and directing the technical proceedings at the event

Binder Editor –
Often the PM retains this role. First time PMs are advised to assign this role to a team member. However, the PM is responsible for ensuring that the quality requirements for the binder contents are met and must personally check for this condition. The binder is often fraught with defects which the binder publisher is left to address at the last minute.

The duties of the Binder Editor are:

- collecting binder materials from presenters and workshop leaders, including abstracts, biographies, softcopy of slides, and handout or workshop items
- soliciting permissions from the presenters to post their materials on the Society web site
- preparing the soft-copy and reproduction masters for the seminar binder
- conveying soft copies of presentation and workshop materials to the Registrar for archival records, along with author’s permissions to post materials on the Society web site

Registration Manager -
The duties of the Registration Manager are:

- receiving and acknowledging registration applications
- obtaining the current A-list from the Society Registrar and conducting a lottery to determine how available seats are assigned; notifying registrants and those on the wait-list
- recruiting assistants to help with sign-in
- preparing name tags, sign-in sheets, and receipts
- collecting fees and conveying them to the Secretary Treasurer
- collecting payments from no-shows and issuing binders upon receipt of payment

Facility Manager –
The duties of the Facility Manager are:

- contracting for the facility and the catering
- arranging for projectors
- confirming numbers for the final food order
- liaising with hotel and catering staff on the day of the seminar

Binder Publisher –
The duties of the Binder Publisher are:

- arranging for the physical production of the seminar binder and handout materials
- potentially preparing name tags and sign-in sheets
- potentially providing workshop supplies

Walter Wawruck is usually willing to perform this role, but the PM should check and confirm this with him, for each seminar.

Evaluation Report Manger –
The duties of the Evaluation Report Manager are:

- collecting evaluation forms at the event
- preparing the evaluation report and submitting it to the PM for distribution

Support of the Society Officers

The Society has a minimum of administrative resources and has no staff or facilities; the operations of the Society are accomplished by means of the voluntary services of the three officers and the members.

The PM should establish a liaison with the following officers to arrange for the provisioning of related support services:

President:

- providing executive sponsorship
- providing the information for last tab of binder
- preparing the publicity notices

Secretary – Treasurer:

- reviewing the budget and confirming the adequacy of the proposed fee
- arranging for depositing the fees collected
- arranging for claims for disbursements by seminar team members
- providing templates for contracts for facilities with the hotel and for registration desk items, if these are not available from the Society website
- black-listing "no-shows" and any who have not yet paid seminar fees

Registrar:

- broadcasting the seminar notices via e-mail
- maintaining the A-list of those eligible for registration priority
- providing information for the last tab of the binder
- arranging for the physical production of the binder
- preparing the name tags
- providing the workshop supplies of consumables
- providing the templates for the soft copy of the binder
- providing other templates, if these are not available from the Society website

The contact information for the Officers of the Society is posted on the website.
See: http://www.vcn.bc.ca/pmrof
See this page: "Officers of the Society"

Publicity Notices

The Registrar will broadcast e-mail notices, inviting registration applications, to the distribution list for the Society. Typically, a notice is sent approximately four weeks before the event. The first notice may contain only some of the topics on the technical program and may recruit additional presenters and facilitators. Depending on the rate at which applications for registration are received, a second notice may be issued approximately two weeks before the event. The second notice would contain the full details of the technical program.

The first notice will contain the e-mail address for registration, and hence the PM-shall have identified the Registration Manager by this date. It will also specify the registration fee. Since fees are not collected until the day of the event, the amount may change between notices.

Process for preparing and issuing notices.
The following process shall be followed:

1. The PM drafts a description of the program, the fee, and the instructions for registration. It is assumed that the budget for the seminar has been reviewed by the President and that the Secretary Treasurer agrees with the proposed fee. Notices used for previous seminars may be used as guidelines.

2. The President, who is responsible for all public and member communications, will draft the text of the entire notice, using previous notices and newsletters as a guide. Items which may be added by the President include:
   - the planned PD seminars and dates for the remainder of the year, including contact information for the PM for each seminar; this is an opportunity to solicit additional presenters, workshop leaders, volunteers, and PMs for subsequent seminars
   - reports on the success of previous seminars

3. The draft must be prepared as an MS Word document containing no formatting other than upper and lower case, with no bolding, underlining or manual line breaks, i.e. hard returns within a paragraph. The file must be formatted using MS Office tools. Files prepared in a compressed format – i.e. the .docx extension - are not acceptable.

The Registrar will format the e-mail message in plain text. Using the current list of Society members, which he maintains, and broadcast software, he will broadcast the notice to all members on the advance or full distribution list. Sample notices from previous seminars, which can be used as templates, are posted at:
http://www.vcn.bc.ca/
See this page: "Calendar of Events & Notices/Archive of Notices and Newsletters"

The Technical Program

Format

The technical program shall be made up of several different types of session: presentations, panels and facilitated workshops. The ideal mix for seminar sessions is having half the time devoted to presentations or panels, with provision for questions and answer periods, and half the time devoted to participatory workshops or hands-on exercises. Usually, six sessions make a full program. It is a Society objective to have fully half the time devoted to participative workshops. The workshop format encourages participants to generate their own knowledge content; it does not mean having the presenter answer questions.

Session Duration:
The suggested durations for technical sessions are:

- 60 minutes for presentations.
- 90 minutes or longer for workshops.

A typical technical presentation is 45 minutes in length, followed by a question and discussion period of 10 to 15 minutes.

Participatory workshop sessions range in length from 60 minutes to 90 minutes or more.

Requirements:
Each professional development seminar shall be a full day in duration, and shall provide the registrants with the opportunity for seven PDUs. This requires seven hours of technical presentations or participatory workshops devoted to a project management topic, since one hour generates one PDU. When counting the number of eligible hours, a ten minute break for each hour is permitted in programs which exceed one hour in length.

In order to qualify for PDUs the session topics shall fall within the PMBOK areas. This scope is broad and offers many opportunities for learning.

There shall be a seminar binder which describes the agenda and technical program and which records the qualifications of the presenters and workshop leaders.

Evaluation forms shall be completed for each program item. There shall be a mechanism for measuring the effectiveness of the educational experiences and materials to ensure that those are acceptable for PDUs.

Presentations

The seminars provide a friendly environment in which PMPs with limited experience in presentation and facilitation are offered the opportunity to rehearse their skills in front of a small, supportive group.

PMPs are requested to volunteer as technical presenters and as workshop leaders. The content of a presentation is not required to be original; it could be taken from a text book or a journal. The only stipulation is that the subject matter be of interest to PMs.

Workshop Facilitation

The aims of a workshop:

- to give the attendees the structured opportunity to contribute their own, considerable knowledge and experience to the issues raised by the presenters
- to encourage participation; the attendees should play an active role in the proceedings and not simply passively absorb the presentation material
- to provide an alternative to the traditional question and answer period at the end of a talk, which is not a sufficient interaction opportunity for learning

In the case where a workshop is a further examination of the topics in a preceding presentation, and the presenter and workshop leaders are not the same person, the workshop or discussion leader should contact the presenter directly to explore ideas for workshop assignments. The workshop leader should be given a copy of the presenter's manuscript or slides as soon as they can be provided. It is helpful if the presenters themselves suggest questions or assignments for the workshops which follow after their talks.

Workshop Requirements:
Unless a presenter happens to be an accomplished workshop organizer or facilitator, different people shall be given the task of designing and directing workshops which address the issues introduced by the presenters.

Each workshop shall be led by a facilitator, and should follow a planned format.

Workshop Formats:
A format that is easy to organize and produces good results is for the attendees to break into smaller groups and to work on specific mini-group assignments. The assignments may be different for each. Each group should have its own sub-facilitator to lead the discussion, enforce

the agenda, and document the conclusions of the group. After the groups have had the opportunity to discuss and respond to their assignments, they will report back to the larger group.

The workshop facilitator will lead in the activities of consolidating and clarifying the findings of the groups.

Other formats are possible. As an example, participants could be asked to complete a questionnaire, or to do a multiple choice quiz on the topic. They would then evaluate the material generated by gathering individual answers and then inviting comment from the group on the answers received.

The questions assigned to the workshop should relate to the topic of the presentation, but should allow the participants to convey their own knowledge on the matter.

Workshop Presentation Example:
Following a presentation on treating various business initiatives as projects, the workshop assignment is:

1. Consider the question: What barriers have you encountered in your attempts to apply project management to various business initiatives that the organization has not normally considered to be projects?

2. Perform these tasks:

- rank the barriers in order of seriousness

- solicit suggestions from the group on strategies for overcoming the leading barriers or objections

- describe successes in overcoming such barriers from the members' own knowledge or experience; picking the best story for later presentation could be a variation

- each group reports back the prioritized lists of barriers, and a

3. Create a consolidated list of the barriers.

4. The originator of the best story from each group relates it to the entire assembly

Recruitment of Presenters and Workshop Leaders

This is *pro bono publico* work, so the specialist resources are asked to donate their time. The Society does not reimburse travel or other expenses incurred by presenters or workshop leaders.

Requirements for Presentation Materials:

No commercial promotion of products or services shall be allowed.

To this end, company and product names shall not be included in presentation or workshop titles. Presenters or facilitators shall not be identified with company names, except in their biographical summaries and as part of published contact information. Company names and logos in slides and presentation materials shall be discouraged. Any person who participates in a technical program shall do so as a qualified professional in her or his own right, and under no circumstance as a representative of an organization.

Presenters and workshop leaders must be qualified in their fields and should be PMPs. The designation establishes a presenter as qualified. As an exception, a non-PMP may be a presenter or workshop leader, but this must be justified by the expertise of the candidate on the selected topic.

Presenters and workshop leaders shall be invited to participate in the entire seminar. Normally, all attendees are expected to register for the event and to pay the fee. The PM may decide to offer complimentary registrations, but must offer them equitably to all presenters and workshop leaders. If a presenter attends only long enough for her or his own session, the presenter will not be asked to register or pay. See the registration requirements starting on page 18, second paragraph, for further details. A template invitation message which sets out the guidelines and requirements for presenters and workshop leaders is available from the Society web site and should be used to ensure that there are no misunderstandings.

Each presenter and workshop leader shall be provided with a copy of the seminar binder, whether or not the presenter is registered.

The Project Manager shall recruit at least one back-up presenter or workshop leader as a contingency in the case of a last minute cancellation. Two back-ups are recommended.

The Binder

Binder Preparation Requirements:
There is an established standard format for the look and content of the seminar binder, including the use of standard fonts and page layouts which must be adhered to. MS Word templates have been developed, and shall be utilized for the preparation of each seminar binder.

For presenters, facilitators, and members of the management team, "PMP" shall follow the name of an individual who holds the designation when printed in the binder.

Copies of slides from speaker presentations should be reproduced three to a page as long as they are readable. If not, these should be reproduced at a larger scale, such as two to a page.

The reproduction masters of the presentation slides must be suitable for black-and -white photocopy reproduction. Coloured slides, especially those with photographs, pose printing difficulties. Presenters must prepare a set of materials for the binder which will photocopy clearly, and which is of a manageable size for reproduction. This may mean preparing a second set of slides with the text, charts and graphs in plain black and white and with any non essential photographs omitted. Simply using the "print black and white" or "pure black and white" options on PowerPoint does not solve the problem. A maximum of thirty single sided pages of binder materials for a presentation is a reasonable limit.

Presenters are requested to make their presentation materials available for posting on the Society website. Photographs and graphics may make the softcopy file of presentation materials unmanageably large, so the maximum file size should be five MB and preferably no larger than two MB. New artwork or the preparation of an amended presentation file for the archives may be necessary.

Reproduction masters for the binder, excluding the final section which deals with Society business, shall be delivered to the Binder Production Manager by an agreed deadline as clean, print-ready hard copy, preferably as a high resolution laser print, together with the softcopy source files in the event that any corrections or changes are required.
Note: hard copy means reproduction masters printed on paper.
The physical contents of the binders will be prepared by photocopying the hard copy.
Note: soft copy means the MS Word and MS PowerPoint computer files used to generate the hard copy.

All MS Word, PowerPoint, and Excel files shall be in the uncompressed formats – i.e. .doc, .ppt, or .xls. File extensions indicating the compressed format extensions – i.e. .docx, pptx, .xlsx - are not acceptable.

Softcopy templates for the binder contents in the form of an MS Word template file are available for download from the Society web site. The template files shall be used to create presentation or workshop material files. Sections of the templates SHOULD NOT be copied into new Word documents; this loses the styles and fonts upon which the appearance of the final document depends. The word processing system used to prepare the binder softcopy must be equipped with the fonts called for by the templates:

Garamond
Arial
Gaillard BT
Times New Roman
CG Times

In order to reduce the volume of the document, it will be printed double sided. Preparation from the soft copy is done single sided.

The hardcopy for the final section of the binder which deals with Society business will be provided by the Officers.

Past problems in meeting these requirements have resulted in many hours of additional work. Presenters, workshop leaders and binder editors are therefore required to check their work before submission. The set of hardcopy reproduction masters shall be proof-read by a reviewer before the masters are delivered to the publisher. The reviewer should not be the person who prepared the masters.

Binder Editors should be experienced in the use of MS Word. All of the content shall be in correct English.

Preparation time for the binder is approximately four hours, if all of the information is available. This includes the biographies, contact information, and abstracts. The time estimate is for the preparation of both the soft and hard copy versions of the binder

Tip for binder editors: Have a previous seminar binder on hand as a reference when assembling the binder.

Facilities

Venue:
The PM is required to contract for the seminar facilities. This task may be delegated to the Facilities Manager.

The Holiday Inn Metrotown is usually used for seminars. Once a year, after the November seminar, the Secretary-Treasurer reserves the required rooms for selected dates for the coming year. Typically Ballrooms A and B are used, but, for a smaller group (up to 25) one of the two rooms is used. When additional space for workshop breakout groups is required, Salons C and E, across the corridor from the Ballrooms, are rented.

The costs when using this hotel are reasonable, and this facility meets all the requirements as set out below. On the evaluation forms, the venue is positively rated for both location and food quality. Free parking is available in the basement and there is good access by public transportation, i.e. busses and the SkyTrain.

However, the Society events are not restricted to this venue. The PM may decide to change the location, but access by public transportation and ease of parking are definitely factors to consider. The Richmond Inn has been suggested as a possibility for a venue change.

Facility Requirements:
The Society requires these as a minimum:

- the flexibility to rearrange tables and chairs to meet individual seminar requirements
- the furniture set up to accommodate conference seating rather than banquet seating; the optimum arrangement is five people at a round table
- spacious rooms: a minimum of 600 square feet is required for 25 people or 1200 square feet for 50 people
- access to the walls for posting flip charts when breaking into small groups during workshops
- availability of a large projection screen, an eight foot or larger size is preferred

Catering Requirements:
For catering, a standard food order has been established as a starting point for use by facility managers in order to control costs. The template for a typical order is available at:
http://www.vcn.bc.ca/pmprof
See: How to Join & Participate >Organize & Deliver a Seminar> Seminar Budget and Food Order

Facility Contract:
The responsibility for the contract with the hotel, for both the venue and the catering, will be entirely with the PM for each seminar. The PM will enter into a separate hotel contract for the event, including a specification of the menu for the event. The PM shall be responsible for all aspects of administering the contract, including notification of cancellation prior to the contractual deadlines should that be necessary, and including payment of the account.

Thus, the PM should obtain from the Secretary Treasurer as early as possible the details of any arrangements with the hotel to date and the template food order. The PM-shall then proceed to establish an individual contract for the event. The PM will have to secure the contract with a private credit card and pay the charges. This expenditure will then be recovered through an expense claim submitted to the Secretary Treasurer.

Equipment and Consumables:
The Society owns a computer-driven projector. Contact the Secretary-Treasurer to arrange for use of the projector. As a contingency against equipment failure, the PM shall arrange to borrow a back up projector.

Flip chart stands are not rented from the facility, since these are costly. Flip chart sheets are simply mounted on the walls of the room using Hold-It putty or masking tape.

Workshop supplies have previously been arranged for by the Registrar. These include flip chart sheets, flip chart pens, tape and putty. Seminar managers should contact him to arrange for such supplies.

Registration

Registration Requirements:

No more than **50 registrants** shall be accepted for each seminar. **This number includes the presenters, the PM, and the Management Team**. Larger groups present problems with acoustics and member interaction. The goal of the Society is member participation and the sharing of knowledge; the participants are not an audience. Additional seminars are preferred to an increase in attendance numbers.

Presenters who attend only long enough to present then leave do not have to register or pay the fee, but shall, for professional reasons receive a binder, which constitutes a record of the published description of the presentation.

Every attendee is expected to register and pay, including Society executives and the members of the seminar management team. The only exception shall be complimentary registrations for presenters if the Project Manager has established a specific policy allowing this for his seminar.

The Project Manager shall establish a policy on complimentary registrations for presenters prior to the solicitation of seminar registrations if required, but this practice is discouraged. The principles upon which the seminars are founded are that the presenters and workshop leaders will be designated PMPs sharing their knowledge with other PMPs; that the presenters participate to learn as well as to inform in an interactive environment; and that they will attend for the entire day. Thus the presenter is expected to pay the modest registration fee. However, the Project Manager may choose to include non-PMPs on the technical program, and may find that it is awkward or inappropriate to ask these persons to pay a registration fee. If any complimentary registrations are granted, they should be offered equitably to all presenters and workshop leaders, regardless of PMP status. The Project Manager shall set a seminar fee which will balance projected revenues and expenses, taking into account complimentary registrations.

The seminar is intended for designated PMPs and the seminar notices are not directed to the general public. Non-PMPs may register if they are the guests of PMPs. However, there is no practical way to screen registration applications to determine who is eligible, so the practice is to accept all applications using a lottery system to assign available seats up to the registration limit The Project Manager shall reserve a block of seats for presenters and workshop leaders, which has the effect of reducing the number of vacant seats available. The Project Manager shall notify the Registration Manager of the names for reserved seat assignments, and for declaring when reserved seats are no longer required. The Registration Manager~~s~~ shall set aside seats for presenters and workshop leaders who plan to attend the entire seminar as advised by the Project Manager. The Registration Manger and the Project Manager should develop a clear understanding on the number of reserved seats for presenters and the management team, and on the complimentary registration policy. The Registration Manager is then expected to apply the policy equitably and impartially.

Every applicant for registration, when accepted, must pay the event fee unless he cancels by an announced deadline. The seminar notice should contain a clear statement on this policy. The text of the statement is given below.

Every person registered for a seminar, including the Society Officers, presenters, and management team members with reserved seats, shall receive a message which acknowledges and confirms the registration, and which sets out the terms of registration.

Registrants who do not attend are designated as “No shows” and will not be allowed to register for subsequent seminars until they have paid. “No-shows” who do not subsequently pay cause costing problems. A strict cancellation policy is in force, and delinquents who do not pay will be blacklisted from registering for future seminars until they clear their debts. The Registration Manager shall obtain a copy of the blacklist from the Treasurer prior to the solicitation of registrations.

Walk-ins are discouraged. A walk-in will be accepted for registration only if there is a vacancy. The Registration Manager will decide when an absent registrant is declared to be a “no-show”. If a walk-in is accepted for an available seat, the fee will be allocated equitably to offset any charges to “no-shows”
Substitutions will be accepted. This is not entirely fair to those on the wait-list; however, the Society cannot punish a registrant who must cancel late, but who can name a paying substitute.

PD seminars have been heavily oversubscribed in the past, sometimes by more than twice the number of available seats. A priority system for registration eligibility is in force. Preference is given to those who have made a contribution of service to the Society; these constitute the “A-List”. Available seminar seats will be allocated as follows:

Reserved Seats:
Seminar presenters, workshop leaders, the seminar management team and the Society Officers are entitled to reserved seats. The Project Manager shall determine attendees amongst these and shall advise the Registration Manager prior to the registration deadline.

A-list applicants:
After the specified number of reserved sets has been allocated, the remaining seats shall be assigned first to the registration applicants who are on the A-list. If the number of A-list applicants exceeds the number of remaining seats, the available seats shall be assigned by lottery, and a wait-list shall be started.

All other applicants:
After seats have been allocated to the A-list applicants, any remaining seats shall be assigned to any other applicants. If the number of other applicants exceeds the number of remaining seats, the available seats shall be assigned by lottery.

If no seats remain after seats have been allocated to the A-list applicants, disappointed A-list applicants will have the first place on the wait-list, and all others will have a lower priority on the wait-list as determined by a lottery among all other applicants.

Assigning names to the A-List:
The A-List is a method of recognizing the contributions made by the presenters, workshop leaders, the seminar management team, and Society Officers. This is done via the seminar completion report. Automatic entry onto the A-List is not provided to all seminar team members.
Entry onto the A-List may also be conferred by the Society officers to members who have provided any additional services.

Summary:
Available seminar seats shall be assigned first to presenters, Society Officers and the seminar management team. Second, the remaining seats will be assigned to applicants whose name appears on the A-list. Third, any remaining seats will be assigned to all other applicants. If the number of applicants exceeds the number of remaining seats, the seats will assigned by lottery, with priority given those on the A-list.

Applications received after the registration deadline will be added to the wait-list in the order in which they are received, whether or not the applicants are on the A-list.

Registration Policy - Fine Print:

The following policy statement is to be included in the seminar notice and in correspondence with registrants and those on the wait-list. The policy statement deals with the conduct of a lottery and with no-shows:

Registration Policy - Fine Print:
As an incentive - and reward - for service, the November 25, 2009 General Meeting of the Society approved a priority system which gives preferential access to seminar registration. Presenters, workshop leaders, management team volunteers, and retired officers will be given first priority for available seats for a period of time following their service. The remaining seats will be assigned through a lottery.

The list of individuals eligible for first priority seating, along with the rules for assigning available seats, can be downloaded at http://www.vcn.bc.ca/pmprof/A-List.PDF

For the <date> seminar, once seats have been assigned to the presenters, the management team for the day, and the priority applicants, a lottery shall be used to determine which of the remaining applications for registration are chosen for acceptance, in accordance with the rules set out below.

Registration for a seminar does not open until a registration notice, such as this one, is broadcast. There is no provision for advance registration. Only those applications received after the time of broadcast will be considered.

Each application received by the Registration Manager prior to midnight <date> will be assigned to either an A-list pool or a regular pool. Each application will be given a random priority number within the pool. Available seats will first be awarded to those in the A-list pool in priority sequence. The remaining available seats will be awarded to those in the regular pool in priority sequence. Once the registration limit is reached, the remaining applications will be placed on a wait-list in priority sequence, first A-list then regular. Each application received after midnight <date> will be assigned the next sequential regular priority number in the order it is received, whether or not the applicant is on the A-list.

Each application will be acknowledged and each acceptance will be confirmed by email.

Each application received will be considered a firm offer to register and to pay the full fee. Cancellations will be accepted up to midnight, <date>. Those on the wait-list will be accepted in priority order if spaces become available prior to the cancellation deadline. A wait-list candidate will be notified of acceptance by email. A wait-list candidate must cancel to be removed from the list.

The Society will issue an email notice of acceptance to the address provided in the registration application, but is not responsible for ensuring that any registrant has received the notification of acceptance.

Any registrant who does not show is expected to pay the full seminar fee. Accepted registrants who fail to pay the full seminar fee will be prohibited from applying for registration at future events until the payment is received.

Payment by cheque is preferred. Cash will be accepted; attendees should bring exact change. There is an ATM in the hotel lobby. No credit or debit cards are accepted.

Registration Procedures:

The tasks of the Registration Manager include:

- obtaining the templates for messages, receipts, sign-in sheets, and name tags from the Society web site; the message templates include:
  - Acknowledge registration
  - Wait-listed
  - Acknowledge cancellation
  - Confirm from Wait-list
  - No-Show
- ensuring that all materials, i.e. name tags, binders, etc, are ready by the evening before the seminar, or ensuring that they are available early on the morning of the event, since attendees arrive as early as 7:30 am
- preparing receipts and ensuring that receipts are pre-numbered
- having a cash float prepared, if necessary

- preparing to have a segmented registration table with signs "A to M" and "N to Z", this streamlines the registrant queues
- inserting the names into the tags beforehand and laying them out in a grid on the table to save time
- preparing to miss the better part of the first topic presented; the reconciliation activities to complete before registration can be closed include counting cash, sorting cheques, dealing with latecomers
- preparing to have two people for reconciliation of cash and cheques with the sign-in sheets and receipt numbers; the final, independent reconciliation will be made by the Secretary-Treasurer when he accepts the cash and cheques
- having at least three people to work the registration desk
- notifying the “no-shows” and collecting payments from them

Follow-Up with Registrants who have not paid:
Following the seminar a notice requesting payment shall be sent to any registrant who has failed to attend and therefore to pay. The registrant will be provided with the contents of the seminar binder upon payment. The binder contents will be provided in electronic form. If the registrant makes a specific request for a paper copy, the registrant will be assessed a postage fee of $3 in addition to the registration fee.

Evaluation and Completion Reports

Seminar Completion Requirements:
There shall be an evaluation report summarizing the evaluations of participants from each seminar. This is an important part of our records for demonstrating our legitimacy in connection with PDU claims.

A template for the evaluation report is available for download from the Society website and shall be prepared in MS Word format. The file must be formatted using MS Office tools. Files prepared in a compressed format – i.e. the .docx extension - are not acceptable.

The evaluation report shall be distributed to all presenters and workshop leaders and to the Officers of the Society. The Registrar will archive a soft copy of the report.
The preparation of the evaluation report takes between six and eight hours, assuming an approximate typing speed of 40 wpm.

The PM shall prepare and submit to the Officers a completion report for each seminar.
A template for the completion report is to be downloaded from the Society website and shall be prepared in MS Word format. The file must be formatted using MS Office tools. Files prepared in a compressed format – i.e. the .docx extension - are not acceptable.

The completion report shall contain:

- An accounting of all actual costs incurred and revenues received for the seminar, presented in an actual vs. budget format. The record of costs shall be an accrual of all costs incurred, whether or not claims for reimbursement have been submitted to the Secretary Treasurer.
- A listing of any outstanding revenues receivable from no-show registrants and the names of the delinquent registrants. After the management team has made its best efforts to collect the outstanding fees, the Secretary Treasurer will add the names of the delinquents to the black list.
- A report on the actual attendance, no-shows, and walk-ins, if any, for the seminar.
- A report on the actual technical program, including a report on any presenters or workshop leaders who failed to follow through on their commitment for the seminar.
- A Lessons Learned Summary.
- Recommendations for any changes to the management manual, hotel contracts and standard menus, or template documents which arise from the experience of managing the seminar.
- Recommendations for adding the names of team members to the A-list, giving them priority access to available seats at future seminars. The recommendation should be restricted to those who have made an extended and sustained contribution of work effort

in the management of a seminar. The project manager and the registration manager normally would qualify for a recommendation. A person who merely assisted at the registration desk for several hours at the event would not normally qualify. The other members of the management team have the privilege of an assured seat at the seminar on which they work. It is not intended that they be extended further privileges at future seminars via the A-list.

- An example of an exceptional effort would be preparing the web pages and presentation files for documenting a seminar on the Society website.

Appendix I: Planning Checklist

This checklist is for guidance only. It was originally prepared by Robert Schultz for the February 2004 seminar, and has subsequently been edited to conform to format of the manual.

Six to eight weeks prior to the event

The Project Manager

- obtains a contract from facility and forward this to the President and the Secretary-Treasurer for review
- secures projectors, laptops and other workshop equipment required; if such equipment is not owned by the Society, it is preferable that these be borrowed since they are expensive to rent
- prepares a seminar budget for the event, using the sample spreadsheet provided, and forward this to the Secretary-Treasurer for review
- sends an e-mail notification of expectation of draft materials to all presenters approximately four weeks prior to the event and confirm any special requirements for each, e.g. video players or software to display presentations
- prepares an announcement for the event intended for the PM community and sends this to the President for approval; the President adds any required details and forward the announcement to the Registrar for distribution; the announcement should contain the names of the PM management team, particularly the name and e-mail address of the Registration Manager, and a call for volunteers / presenters if required

Five weeks prior to the event

The Project Manager

- signs the contract and return it to the facility; the private credit card of the PM should be used to secure the facility
- prepares publicity materials for Society broadcasts one week prior to intended distribution and sends these to the President who combines these with other news information before distribution
- ensures that the Registrar has everything required to distribute the announcement for the event to the member community

The Registration Manager

- receives e-mail registrations and manages the wait-list, which could occur within days of announcement

Four weeks prior to the event

The Project Manager

- receives the draft presentation/workshop materials, i.e. abstracts, biographical summaries, draft presentation material, etc, from all presenters
- reviews these and provides feedback to the presenters on Society presentation preferences
- determines the best flow of the seminar presentations and confirm the agenda with the presenters
- sends the agenda with abstracts and biographical summaries to the President who will prepare messages for communication with the member community

Three weeks prior to the event

The Registrar

- distributes the announcement for the event to the member community, including a call for more presenters, volunteers, facilitators, etc, if required

Two weeks prior to the event

The Project Manager

- receives the final versions of the presentation/workshop materials from all presenters

The Binder Editor

- begins preparations for both the soft-copy and the hard-copy binder material
- reviews the hard copy draft with the President and the Binder Production Manager for conformance to the templates
- for slide presentations, requires 3 slides per page and confirms the readability of each slide
- suggests modifications to conform to binder preparation standards where required

One week prior to the event

The Project Manager

- confirms the numbers of participants and adjusts the menu if required
- confirms that the desired room/s is/are available and that the seating arrangement is as requested

The Binder Editor

- delivers both the hard-copy and soft-copy binder materials to the Binder Production Manager (usually the Registrar); in extreme cases, this can be achieved four days prior to the event

The Registration Manager

- distributes reminders to registered participants, but not to wait-listed registrants
- places the final registration list into both the soft-copy and the hard-copy binder materials
- confirms that helpers are available to assist with facilitation and/or registration

Three days prior to the event

The Registration Manager

- freezes registration changes

One day prior to the event

The Registration Manager

- obtains the name tags, receipts, and binders on the evening before, if these are available, or arranges to have them delivered to the registration desk one-hour prior to event

The Project Manager

- prepares the laptop, backup laptop or data storage device
- tests both projectors
- acquires a power bar, if one is not owned
- examines all presentations and workshop materials using the projectors
- reviews all presentations for clarity, modifies the colours and sizes if required using both projectors and identifies anything that is missing
- prepares notes for introducing the speakers and for making announcements during the course of the seminar; suggestions for such notes include draft notes for all topics that should be addressed, and are:
    1. at the beginning of the event: welcome all attendees, give a brief overview of the day and remind attendees about early departures, cell phone use, etc

2. before and after each speaker: give a brief biography, introduce the topic and thank them for volunteering, afterwards, thank the speakers again
3. at the end of the day: thank everyone for attending, for no cell phone interruptions, remind everyone to complete the seminar evaluations, thank everyone for staying to the end, early departures are an insult to registrants on the wait-list

During the event

The Project Manager

- monitors the timing of the proceedings
- ensures that the agenda is followed
- introduces himself to as many of the attendees as possible upon arrival and throughout the day
- introduces and closes the event

The Facility Manager

- liaises between the participants and the hotel-staff for changes to heat, food, beverages, etc

The Registration Manager

- ensures that the cash and/or cheques are given to the Secretary-Treasurer if he is present at the event; and if not, secures these and presents them to the him as soon as possible afterwards

Immediately after the event

The Registration Manager

- ensures that the cash and/or cheques are given to the Secretary-Treasurer if he is present at the event; and if not, secures these and presents them to the him as soon as possible afterwards

The Evaluation Report Manager

- gathers the evaluation report documents

The Project Manager

- holds a brief post-mortem meeting of approximately 15 minutes with the seminar management team to document Lessons Learned and obtain suggestions for changes to this manual

- resolves any problems prior to leaving and notifies the facility staff when the event is over; the final bill from the facility is prepared and sent to the PM via e-mail within a few days of the seminar
- ensures that any flip chart sheets containing information for follow-up documentation have been collected and given to the facilitators or discussion leaders responsible for preparing the documentation
- gathers all the remaining binders, binder covers, and workshop supplies
- gives the binder contents to the Registration Manager for mailing to the “no-show” registrants
- gives the binder covers to the Registrar for re-use

Subsequent to the Event

The Project Manager

- receives the final bill from the facility and checks it for validity; forwards this to the Secretary-Treasurer
- prepares the completion report and submits this to the Society officers

The Registration Manager

- advises all “no-show” registrants of the methods by which they can submit payment, including a three dollar postage fee for mailing the binder contents; mails or e-mails the binder contents to these registrants upon receipt of payment
- submits all payments received from “no-shows” to the Secretary-Treasurer
- submits all unclaimed binder contents to the Registrar

The Evaluation Report Manager

- prepares the evaluation report and issue the report to all presenters and workshop leaders and to the Society officers