Regional Training Program Handbook

A How-To Guide
for the Northeast Region
Board of Directors

November 2011

Regional Training Program Handbook
Table of Contents

Section Name	Page Number
Introduction	3
Standing RTP Committee	4
Appoint the Committee	4
Theme	4
Planning Meetings	5
Timeframe – Spring and Autumn	6
Meet-and-Greet	7
Budget	8
Location	9
Agenda/Speakers	10
Catering	11
Marketing	12
Scholarships	13
Raffle Baskets	15
Sponsorships	16
Exhibitors	17
Registration	18
Program Book	19
Conference Bags	20
Certificates	21
Name Badges	22
Special Events/Annual Regional Awards	23
Conclusion	24
Appendices A – Sample Planning Meeting agenda B – Sample Budget C – Sample Agenda D – Registration Checklists E – Removable Checklist	25

Introduction

Federally Employed Women (FEW) requires its regions to sponsor at least one Regional Training Program (RTP) per year. The Northeast Region was formed in 2008 by the merging of the New England and New York Regions. At that time, the Northeast Region Board of Directors chose to offer two RTPs because agency training and travel dollars were shrinking and members were being asked to choose between the FEW National Training Program (NTP) and the Region's RTP for funding. Members were necessarily choosing the FEW NTP as a better use of agency funding but that meant there wasn't enough money left over to travel to a centrally-located RTP.

By offering two RTPs, the Regional Board of Directors put the training where the members were located – the Spring RTP in Massachusetts to accommodate the Greater Boston and Greater Merrimack Valley Chapters and the Autumn RTP in New York to accommodate the Big Apple, Brookhaven, Fort Monmouth, and Western New York Chapters. By holding the two RTPs where the members are located, more members and non-members were able to pay out-of-pocket to attend because they did not need to stay at a hotel overnight, unless they chose to, or pay for out-of-town transportation.[1]

The two RTP formula has worked well for the Northeast Region. Attendance has proven steady for each event, averaging about 25 attendees per location.

It should be stated here that notebooks from each RTP are kept to document the entire process from planning to implementation and are part of the Region's historical documents to be turned over from administration to administration to provide resources, guidance, and ideas, to supplement this Handbook. More information can be found on the Region's website (http://www.nerfew.org) by clicking on the Training link and then clicking on the Spring and Autumn RTP links.

[1] As the Northeast Region grows, the Regional Board of Directors may choose to revisit the two RTP concept, either to offer one centrally-located RTP or to add a third RTP to the schedule in a location closest to newly chartered chapters. For example, if a chapter is chartered in Rhode Island or Connecticut, a third RTP may be considered to better accommodate those members' training/travel needs. A motion would be needed to incorporate the change in schedule into the Regional Policy and Procedures Manual, as well as updating this handbook to provide guidance to future planning committees.

Standing RTP Committee

The Region has a Standing RTP Committee comprised of the Regional Manager for oversight; the Regional Representative for oversight; and, the Regional Training Chair for expertise. These individuals participate in both the Spring and Autumn RTPs.

Appoint the Committee

If a Chapter within the Region does not volunteer to take the lead on the Spring or Autumn RTP, the Regional Manager will appoint a committee comprised of members from the chapters being served. For example, for the Spring RTP, members will be sought for appointment from the Greater Boston and Greater Merrimack Valley Chapters. For the Autumn RTP, members will be sought for appointment from the Big Apple, Brookhaven, Fort Monmouth, and Western New York Chapters.[2]

Theme

In the past, the RTP Committee has offered a theme contest, with the winner being awarded a free registration; second place, a $20 discount; and third place worth a $10 discount. However, fewer and fewer members participated in the contests, so the RTP Committee began deciding among the members on a theme.

[2] As the Northeast Region grows, members will be sought from the new chapters, as well.

Planning Meetings

It is highly recommended that weekly planning meetings are held to go over all the aspects of the RTP that have been outlined in this handbook. The first meeting should be planned for at least 90 minutes, if not two hours. As aspects are confirmed, they are moved off the agenda and the meetings will shorten. However, if something changes (for example, a confirmed speaker backs out), the item should be returned to the agenda for continued discussion.

Emergency situations will arise between planning meetings. Do not hesitate to either call for an emergency meeting just to discuss the situation or handle it via e-mail, so long as all RTP Planning Committee members are able to voice opinions and/or vote, if need be.

RTP Planning Committee members, especially if they are new to the process, may not see the need for weekly meetings. *Do not be swayed by their inexperience*. Hold the meetings and discuss every aspect of the RTP in detail and at length to ensure all members of the RTP Planning Committee understand the various situations and are in agreement going forward with whatever action needs to be taken. For example, the person handling the catering will present the proposed menus for approval by the committee. Once agreement has been reached on the menus, the responsible person will confirm the menu with the caterer. Catering will move to the confirmed list. If, however, the caterer calls with a change, catering will move back to the meeting agenda for additional discussion/resolution so that everyone on the committee knows what is happening with catering.

Timeframe – Spring and Autumn

The Spring RTP was centered in the Massachusetts area to accommodate the most active chapters in the Region in 2008. The Greater Boston Chapter had revitalized in 2007 and the Greater Merrimack Valley Chapter was chartered in 2007. By 2008, the Brookhaven Chapter was a well-established chapter but the Fort Monmouth Chapter was struggling. However, it was unlikely that members from either of these chapters would be able to travel to Massachusetts or take the lead for a Spring RTP as an RTP had not been held in that area since 2006[3]. Greater Merrimack Valley Chapter was willing to take the lead for the Spring 2008 RTP with support from members of the Greater Boston Chapter. The GMV Chapter has taken the lead on the development of the RTPs since 2008. However, as other chapters are formed, it is possible that the lead may shift to a new chapter, with support from GMV and Greater Boston Chapters.

In 2008, the Brookhaven Chapter took the lead for developing the Autumn RTP. With the chartering of the Western New York Chapter in February 2009 and Big Apple Chapter in July 2009, the number of members available to participate in the Autumn RTP grew, right along with interest in taking the lead. By 2010, the Big Apple Chapter was interested in taking the lead for Autumn 2011. Brookhaven Chapter took the lead in 2010 and Big Apple Chapter took the lead in 2011. Lead will likely shift back to Brookhaven for 2012. As with the Spring RTP, however, as new chapters are chartered, interest in leading the RTP effort may shift with the well-established chapters in the area lending support.

Visit the Region's website, http://www.nerfew.org, to click on the Annual Reports for these years for more detailed information about prior RTPs.

[3] The New England and New York Regions held a jointly sponsored RTP in 2006 in Manhattan with limited success. However, no further RTPs were held in either Region until Spring 2007 when the Greater Merrimack Valley (GMV) Chapter took the lead to hold one in the Spring. Once the merge occurred, GMV Chapter was willing to continue taking the lead for the Spring.

Meet-and-Greet

An important facet of the RTP planning is the night-before Meet-and-Greet, which serves as an ice breaker for attendees. Attendees rarely know each other before they enter the classroom. By sponsoring a Meet-and-Greet, attendees and guests have an opportunity to socialize in a casual setting, getting to know each other better before they sit down in a formal training setting.

The Spring RTP Meet-and-Greet has taken place at Chili's on Reiss Avenue in Lowell, MA, near to the UMass Inn and Conference Center. The UMass Inn and Conference Center has been the site of the Spring RTP for the past three years and is the planned location for 2012. Holding the Meet-and-Greet close by allows attendees to mix and mingle for a couple of hours and be back at the training site at a reasonable hour.

The format for the Meet-and-Greet is casual, friendly, open, and intended to encourage mixing and mingling. The timeframe is either 6:00-8:00 p.m. or 6:30-8:30 p.m., depending on the preference of the participants. By holding the event at a local, well-known restaurant, attendees are familiar with the menu and come and go as they wish. Everyone who comes pays for their own meal and stays as long as she or he wishes.

In some instances, two of the donated raffle baskets are brought to the Meet-and-Greet for "early sales." The ticket sales from the raffle baskets are used to support the Region's Scholarship Fund. It depends on the gathering whether the baskets are put out or whether they are held back for the RTP itself. The RTP Planning Committee will usually make that call early in the evening.

The Autumn Meet-and-Greet is handled similarly to the Spring event. Because the Autumn RTP shifts location between Manhattan and Long Island, it is up to the RTP Planning Committee to determine where the best location for the Meet-and-Greet is. In Long Island, it has been held at Applebee's. In Manhattan, it has been held at Mehtaphor Restaurant in the Duane Street Hotel.

Budget

The RTP budget baseline is $1,000, as established by policy by the 2008 Regional Board of Directors. A separate account at the banking institution was established to maintain the $1,000 minimum. Since that time, the RTP fund has continued to grow through successful RTPs and sponsorship contributions. A separate budget sheet is maintained through the life of the RTP and closed out after all receipts for expenses and income has been received and reconciled. The closed out budget sheet is then forwarded to the Regional Treasurer for incorporation with the rest of the Region's financial information.

The Spring RTP budget is different from the Autumn RTP budget based on location. The Spring RTP takes place at the UMass Inn and Conference Center which requires a room fee, audio/visual fees, and on-site catering using the school's catering service. The Autumn RTP may take place at a federal facility, in which case the space is free and catering can be negotiated, or it may be held at a hotel, but again the catering is negotiated.

Other RTP expenses may include, but are not limited to:

- printing for the program book,[4]
- shipping items for the conference bags,[5]
- catering,[6]
- speakers,[7]
- room rental fees,
- audio/visual rental fees, and,
- reimbursement up to $40 a piece for raffle baskets[8].

[4] Up to Autumn 2011, the printing expenses have been donated by the Regional Manager as she printed the program book on a color printer at her home; however, this is not a requirement of the Regional Manager, so the printing cost must be factored in for future RTPs.

[5] This was an expense for the first time in Autumn 2011, as the Big Apple Chapter wanted to stuff the conference bags themselves for the experience.

[6] As of Spring 2011 and Autumn 2011, First Command Financial Services has kindly covered the expense of the luncheon catering ($600 in Spring; $1200+ in Autumn). However, prior to 2011, the Region absorbed the cost of the catering, so it must be kept as a budget item expense until coverage by a sponsor is assured.

[7] Most RTP speakers are FEW members and, therefore, free of charge; however, for the Spring RTP, the RTP Committee has contracted with paid professional speakers for up to $650.

[8] In the past, most people have opted to donate their raffle baskets to increase the amount earned for the Region's Scholarship Fund. However, the RTP Planning Committee does budget for up to $40 per basket for reimbursement, so this needs to be budgeted out and managed.

Location

For the Spring RTP, the 2007 location was UMass in downtown Lowell, MA. However, the following year, the UMass Inn and Conference Center on 50 Warren Street in Lowell became available and the RTP moved there. The accommodations for overnight guests and the ease of coming downstairs and being at the RTP was attractive. In addition, the Inn and Conference Center turned out to be less expensive than the original site. The Spring RTP has been at the Inn and Conference Center since 2008.

For the Autumn RTP, the location has depended on whether it was held in Long Island or Manhattan. For Long Island, the first RTP was held at the IRS Brookhaven campus. However, it became more difficult to hold the RTP at this site with tightening security concerns. The following Long Island RTP was held at the Crowne Plaza hotel in Holtsville. However, problems with the management made this less than an ideal location for future RTPs. The Manhattan RTP was held at 290 Broadway on the 30th floor with better success. The Big Apple Chapter is comprised of mostly IRS and EPA members who were able to secure as much space as was needed and the building, being open to the public, made access less difficult than the Brookhaven campus.

Signage

Signage for the two RTPs was provided by the members. At the UMass Inn and Conference Center in the Spring, signage directed attendees to the conference room on the first floor or they could stop at the front desk to inquire.

For the Autumn RTPs, members were escorted to the training sites. However, for the Autumn 2011 RTP, the members created several signs that supported the escorts.

It is strongly encouraged that signage be provided, regardless of how easy it may be to find ones way to the training site. There are always late arrivals who will miss the opportunity to be escorted and must find their own way to the training site.

Agenda and Speakers

The Spring and Autumn RTPs have one thing in common as far as the agenda/speakers are concerned. That is, they must cover FEW's four focus areas, which are Compliance, Diversity, Legislation (also called Congressional Relations), and Training.

Generally speaking, the RTP Planning Committees will start with inviting up to two (the maximum National FEW will approve) of the Vice Presidents for the corresponding focus area groups to the RTP. If approved, they will cover their area as well as one other to get in all four. If not approved (usually because the RTP is in conflict with a VP's schedule or a standing meeting, such as the FEW Executive Committee meeting in May that was pushed to June or in October that conflicts with the Autumn RTP), there is a PowerPoint presentation entitled, "All About FEW" that may be used. Cathy Fletcher is a member of the Greater Boston Chapter who is a past Vice President for Training, who can make this presentation.

The process for inviting the Vice Presidents to an RTP is to send an e-mail request to MembershipVP@few.org, with a cc to President@few.org and EVP@few.org. The cost of the trip will be calculated and the approval granted if it is within the VP's budget for that time of the year. Generally speaking, National FEW is *very* supportive of sending Vice Presidents in the four focus areas to RTPs. Only a calendar conflict will likely prevent a Vice President to an RTP. As an alternate, the Vice President for Membership and Chapter Organization may be requested to fulfill this role.

After meeting this requirement, the RTP Planning Committee will look to speakers who can present career-related workshops, with workshops in financial planning and/or motivational speakers. Past presenters have included, but are not limited to:

- Sheree Galpert, Dramatic Results, as a motival speaker (paid $150 per workshop) and Keynote speaker ($100).
- Ed Blunt, Artistry.com, as a motivational speaker (provided pro bono for the first RTP, but may come with a speaker's fee for succeeding RTPs).
- Pamela Judd, Big Apple Chapter, on career-related topics such as Generational Intelligence: Working with 5 Generations in the Workplace."
- Cathy Fletcher, Greater Boston Chapter, "Diversity Training."[9]
- Arlena Fitch-Gordon, Equalitarian Chapter, "The Successful Interview."[10]
- Paul Fierimonte, Blue Cross Blue Shield, "Women's Health Issues."
- Mona Santos, First Command Financial Services, "Your Salary May be Frozen, but Your Options Aren't!"

The key to a successful agenda is to find the right mix of personal and professional growth topics and as many free speakers as possible. Look to FEW chapters and agencies for possible free presenters as a first option.

[9] She was serving as the Vice President for Diversity at the time.
[10] She was serving as the Vice President for Training at the time.

Catering

Again, catering is handled differently between the Spring and Autumn RTPs because of local requirements. However, both RTPs offer a continental breakfast as part of the registration process and an on-site luncheon.

For the Spring RTP, the UMass Inn and Conference Center uses Aramark for its catering. The Regional Training Chair has been the coordinator with UMass Inn and Conference Center for this aspect of the RTP. She works with the Aramark contact to select the continental breakfast items as well as the deli-style, make-your-own sandwich luncheon items, to include chips, salad, drink, and dessert options. The total catering usually comes to around $30 per person ($10 for breakfast and $20 for lunch). As noted earlier in this Handbook, in 2010, First Command Financial Services out of Cambridge, MA, covered the catering for the luncheon (approximately $600), while the Region covered the catering for the breakfast (approximately $300). Go to the Northeast Region's website and click on the Spring RTP link to view photos from the event, including the luncheon on the patio.

The Autumn RTP catering has been handled by the hosting chapter and RTP Planning Committee. When it was held at the Brookhaven IRS campus, the Chapter donated the luncheon, a make-your-own lunch style buffet. The following year at the Crowne Plaza Hotel, it was similar to what was offered at UMass Inn and Conference Center and the Region covered the entire cost of the breakfast and luncheon. However, due to a mix-up with the hotel's management, a substantial discount was provided on the room rental and catering costs. By 2011, First Command Financial Services out of New York had provided the funding for the catering. A member of the Big Apple Chapter worked with DeliMarie to cater the breakfast, luncheon, and afternoon snack in the same price range as the Spring RTP.

It is up to the RTP Planning Committee member who handles the catering aspect of the RTP to negotiate the best prices possible for the breakfast and luncheon, at a minimum. If an afternoon snack can be worked in to advantage, that is a bonus for the attendees.

Marketing

Advertising the RTPs has been via a variety of means; however, word-of-mouth following a successful RTP has been the most popular.

Other media outlets tried, with varying success, has been:

- paid newspaper ads in local newspapers;
- posters on library bulletin boards;
- free websites;
- postings on FEW's electronic calendar;
- submitting articles to the FEW *News and Views* newsletter;
- standing updates in the Region's monthly newsletter;
- posting on the Region's website under Training under a stand-alone Spring or Autumn RTP link;
- development of an RTP-specific Alert Me! list of e-mail addresses voluntarily provided by visitors to the website;
- articles in IRS campus-wide newsletters, agency networks (such as EPA's and IRS' employee organization networks);
- distribution of material to the Executive Directors for the respective area Federal Executive Boards (i.e., New York, New Jersey, Massachusetts, Connecticut, Rhode Island) and Federal Executive Associations (i.e., New Hampshire, Vermont, Maine, Western Massachusetts, Connecticut, and Rhode Island); and,
- ads placed in upcoming women's conferences (e.g., New Jersey Women's Conference), whenever possible.

One member of the RTP Planning Committee will usually take the lead on this and develop the appropriate articles and ads for full committee approval before submission.

Scholarships

The Northeast Region offers a matching RTP scholarship in both the Spring and Autumn. The funds are matched from the RTP Scholarships available through the FEW Foundation for Education and Training.[11] In 2010, the FEW Foundation increased its RTP scholarships to all of FEW's regions to $150 per region. The Northeast Region opted by approved motion to request $75 per RTP, which met with the FEW Foundation's approval, and to match the $75 per RTP to bring each scholarship up to a maximum of $150 for the two RTP scholarship winners. The procedure was then included in the Region's Policy and Procedures Manual.

In the Spring 2011, there were no submissions to the RTP Contest, so the RTP Planning Committee opted to award the scholarship to Christine Cantine, President, Big Apple Chapter, who was serving on the Spring RTP Planning Committee to learn all she could before the Big Apple Chapter hosted the Autumn 2011 RTP. The rationale was that by bringing Christine to the 2011 Spring RTP, she would have first-hand experience to draw on as an attendee to take back with her to her chapter to better sponsor the Autumn 2011 RTP. To keep the expenses manageable, Christine room-shared with Jayne Cousins, Regional Training Chair, in hopes that they would be able to talk about the RTP planning process while together as much as possible.

For the Autumn 2011, the RTP Planning Committee changed the contest slightly to ask the question, "What are the barriers to women's advancement in federal service? And, what would you do to remove the barriers?" Jenine Dunn, a member of the Western New York Chapter, was selected as the scholarship winner and opted to apply her scholarship to her hotel stay in New York City.

The Regional Manager sends out the announcement of the opening of the RTP scholarship window, along with the supporting documentation. The Region's Scholarship Committee, not a part of the RTP Planning Committee, handles the receipt, review, ranking, and selection of a scholarship winner and so informs the Regional Manager, who is a standing member of the RTP Planning Committee. The Regional Manager then calls the winner and works with the Regional Treasurer to move monies around, if need be, to ensure

[11] Dawn Nester was the President of the FEW Foundation during this time. It was a conflict of interest for her to be both the Northeast Region Manager and President, so she stepped aside and had the Regional Representative or Regional Training Chair liaison with Marie Argana, FEW Foundation Treasurer, for anything related to the RTP scholarship.

Scholarships (cont.)

the scholarship is correctly applied. The scholarship is usually applied to the registration fee first with the remainder of the scholarship applied to transportation or hotel fees, after submission of the applicable receipts. However, the scholarship may be applied in whole or in part to whatever it best covers, so long as the recipient retains the applicable receipts to submit with the Region's reimbursement form after the RTP. The winner is notified that the scholarship may not be applied to meals before, during, or after the RTP. Please see the Region's Policy and Procedure Manual for more information about how scholarships are handled in the Region.

Raffle Baskets

The Northeast Region offers raffle baskets, a 50/50 raffle, and a “Lottery Tree” for participants of its RTPs. This is a two-fold event, in that it breaks up the training with fun and provides additional funds for the Region’s Scholarship Fund.

RTP Planning Committee members, as well as any chapter members who wish to, make raffle baskets up to $40 in value. If they exceed the $40 limit, their expenses are out-of-pocket. They will only be reimbursed for the allowed $40 per basket with submission of their receipts and a completed Regional reimbursement form, submitted to the Regional Treasurer within 15 days after the event. Generally speaking, the Region budgets for 6 raffle baskets or $240. Tickets are $1-for 1; $5-for-6; or the-length-of-your-arm-for-$10. The 50/50 and “Lottery Tree” tickets are offered at the same price.

The raffle basket contributor will make up a sign that lists what is in the basket. Brown paper bags are placed in front of each basket and attendees choose which basket they want to take a chance on (all in one or spread out). A separate bag is maintained for the 50/50 raffle.

Monies from tickets for the 50/50 raffle are kept separate from the other monies being taken in by the Registrars because it will be split between the winner and the Northeast Region for the Scholarship fund.

Raffle baskets are then displayed in a special area of the RTP meeting area, usually near the exhibitors to encourage visitation to both areas. Raffle tickets are sold throughout the day as raffles are drawn at the conclusion of each class while on participants are on break.

Sponsorships

The Northeast Region has been fortunate to have several sponsors for its RTPs since being merged in 2008. The Regional Manager is the best person to liaise with the sponsors, however, because she has the best level of information needed by a corporate sponsor (e.g., Region's EIN, ability to sign W-9's, what's needed from a big picture perspective, etc.). Sponsors are offered:

- a full page ad in the program book;
- a 6-foot exhibit table in the area where attendees will be able to visit them easily and often;
- a link on the Region's Sponsorship page, as well as on the RTP pages; and,
- listing on the Region's letterhead with a statement urging people to visit the website to visit their links.

New sponsors are being added often. Continue to talk to organizations, corporations, and companies that have an interest in women and/or federal employees to see if they are interested in becoming a new sponsor.

Current sponsors (as of November 2011) are:

- BayPath College (Spring only)
- Blue Cross Blue Shield (both – Anthem in MA and Empire in NY)
- DCG Technology Learning Centers (conference bag stuffers, both)
- Federal Employee Defense Services (FedsProtection.com) (both)
- Federally Employed Women (both)
- FEW Foundation for Education and Training (both)
- First Command Financial Services (both – Cambridge, MA, and NY, NY)
- Government Employees Health Association (Spring only)
- Grantham University (both)
- Letitia Agada Services (Autumn only)
- Long Term Care Partners (usually both but sometimes only Spring)
- Northeast Planning Associates (Spring only)

Sponsors may pay by check, made payable to NERFEW and sent to the Region's post office box.[12] Or, they may pay online using the Region's PayPal link for either the Spring or Autumn web pages.

[12] The Region's address will change with the change of elected officials.

Exhibitors

Exhibitors may be the same as the sponsors, but not always. Sometimes, a company or organization will only want to have an exhibit without providing financial support or vice versa.

An example of an exhibitor is Kristina Tiedke, the Regional Membership Chair and a member of the Greater Merrimack Valley Chapter. Kristina makes beaded badge lanyards which she sells at the RTP and donates a portion of the proceeds to the Region's scholarship fund.

Another example of an exhibitor only is the FEW Foundation for Education and Training. The FEW Foundation's Board of Trustees are scattered all over the country. However, the President was local and set up the displays.[13]

[13] Dawn Nester was the President of the FEW Foundation during this time. It was a conflict of interest for her to be both the Northeast Region Manager and President, so she stepped aside and had the Regional Representative or Regional Training Chair liaison with Marie Argana, FEW Foundation Treasurer, for anything related to the RTP. Dawn would set up the display table, however, as she had the banner and documentation.

Registration

Registration opens on the Northeast Region's website when the agenda and speakers have been at least 90 percent confirmed.

Members = $50
Non-members = $65
Students with valid ID/retirees = $35

Attendees may pay via the Region's website using PayPal followed by faxing the downloaded and completed registration form or complete the registration form and attach a check, made payable to NERFEW, and mailed to the Region's post office box.[14] Registration checklists will be prepared in advance for the Registration table.

On the morning of the RTP, there should be a table set up outside the door with at least two people, called Registrars, to accept walk-ins, payments by check (personal or government), and to hand out name badges and conference bags, as well as direct attendees to where the continental breakfast is set up. A cash box can be provided by the Region with "seed money" of at least $65 in $20's, $10's, $5's, and $1's, as needed.

The Registrars will also handle the sale of raffle tickets. As noted in the Raffles section, monies for the raffles are kept separate from any registration fees paid at the door. The RTP Planning Committee strongly encourages potential attendees to register early to avoid paying at the door; however, some people will usually want to do that. Raffle monies are further separated by whether the monies are for the raffle baskets and "Lottery Tree" or for the 50/50 raffle so that the 50/50 raffle monies can be split with the winner and the Region's scholarship fund.

After the RTP has gotten under way, Registrars will usually sit with the table for at least 30-45 minutes to greet any last-minute arrivals. After an hour, Registrars are invited to move into the training space, always ensuring someone has the cash box with them at all times.

At the end of the day, the monies for the 50/50 raffle are separated out and a winner is drawn. The money is split with the winner and the remaining monies are included with the rest of the raffle monies for the Region's Scholarship fund deposit.

the cash box is returned to the Regional Manager if the Regional Treasurer is not in attendance. The Regional Manager or Regional Treasurer will sort out the day's receipts, annotate the RTP spreadsheet, and deposit the funds as soon after the RTP as possible (usually no later than the following Monday, if the Saturday after is a travel day)

[14] The Region's address will change with the change of elected officials.

Program Book

The Northeast Region offers a program book that includes

- a letter from the President (which is written by the Regional Manager and cleared through the FEW Communications Chair and National President prior to publication);
- a Regional Manager's letter;
- the day's agenda;
- ads from the sponsors;
- information about the upcoming FEW National Training Program (if available from the NTP Planning Committee);
- information about the upcoming RTP;
- congratulations to the RTP Scholarship winner; and,
- a listing of the Region's sponsors, to include links.

The program book is printed in color and sheathed in an appropriate "book cover," such as a binder with a window to showcase the RTP graphics.[15][16] Enough copies should be made for each of the participants' conference bag, as well as sharing with Exhibitors and Sponsors, as wanted.

[15] Walmart offers such a hard plastic book binding for $1.88 (before taxes).
[16] The Regional Manager has printed the program book on her home color printer and donated the costs associated with the printing since the RTPs began to be offered. However, this is not a requirement of the Regional Manager position. Other options for printing should be explored for the most economical.

Conference Bags

Conference bags have been provided in the past by Blue Cross Blue Shield (BCBS), DCG Technology Learning Centers, and Government Employee Health Association (GEHA). Usually, these bags vary in size and strength but free for the asking. The Region is currently working its way through the inventory of bags provided by BCBS.

Conference bag stuffers are also provided by the sponsors and exhibitors, generally speaking, very generously. There is usually enough provided at one RTP to carry over to the next, with a new supply provided for the following RTP, so that something is always being carried over.

When there isn't enough of one item for every bag, the conference bag committee will ensure that there are an equal number of items in each bag, even if those items don't match. For example, if there are 25 conference bags with 20 items available, each bag would receive eight items. Anyone who received something she or he didn't want in her or his bag would be encouraged to swap with someone else during the RTP to make it more fun. Most attendees, however, are happy to be receiving any kind of free gift so swapping is held to a minimum.

The Program Book (see previous section) is also placed in the conference bag to ensure every attendee receives one.

Registrars (see previous section) give out the conference bags after the attendees check in.

Certificates

There are five types of certificates associated with an RTP. They are:

- Certificate of Appreciation for the RTP Planning Committee,
- Certificate of Appreciation for Trainers;
- Certificate of Appreciation for Exhibitors/Sponsors;
- Certificate of Completion for attendees; and,
- Certificate of Scholarship for the RTP Scholarship winner.

The certificates are made by the RTP Planning Committee, usually assigned to one member, from an RTP Certificate template that has been used since the RTPs started being offered. They are printed in color[17] and placed in a FEW certificate holder.[18]

The Certificate to the Scholarship winner should be done at the opening of the RTP so that everyone in the room has an opportunity to realize there is a process in place to send a member fully-funded to the RTPs. It also gives due recognition to the lucky winner representing her (or his) chapter.

The Certificates of Appreciation for the trainers should be presented by the RTP Planning Committee person responsible for introducing the speaker at the end of the workshop/presentation. The RTP agenda will identify who the workshop speaker is and who from the committee is introducing the presenter. Certificates should be kept at the podium in the order of presentations for easy access.

Certificates of Apprecation for the Exhibitors/Sponsors are presented at the end of the day.

Certificates of Completion are presented to the attendees at the end of the day.

[17] The RTP committee member may submit a receipt for ink and paper, if wanting to be reimbursed.
[18] The Regional Manager or a Chapter President may order up to 100 FEW certificate holders for free using the FEW brochure order form. This should be done well in advance of the RTP to ensure the certificate holders are on hand when needed.

Name Badges

One RTP Planning Committee member will take responsibility for the creation of the name badges. This individual may be the same one who handles the certificates, but not necessarily.

Name badges are needed for attendees, exhibitors, and sponsors. The name badges should include, at a minimum:

- Name
- Chapter affiliation (if a member)
- Non-member (if not a member)
- Role within the Chapter or Region (e.g., Chapter President, Chapter Diversity Chair, Regional Training Chair, Regional Representative, etc.)
- The name of the event (e.g., Northeast Region, Autumn 2011 RTP)
- The region logo and web URL (http://www.nerfew.org)
- The FEW logo (if there is room)

The Registrars (see previous section) hand out the name badges with the conference bags at check-in.

Name badges are created in-house. Receipts must be kept for name badge paper and ink for attachment to the Region's reimbursement form, if reimbursement is wanted. Per Region policy, reimbursement forms with receipts must be turned in no later than 15 days after the event for which reimbursement is needed. Exceptions can be made, after discussion between the Regional Manager and Regional Treasurer.

Special Events/Regional Awards Presentations

A special event may be planned to follow the close of the RTP, if the RTP Planning Committee sees it as a feasible extension of the event. RTPs are generally held on Fridays, so out-of-town attendees may opt to stay overnight and leave the following morning, so an after-hours event may be welcome.

For example, in 2010, the Brookhaven Chapter offered a Halloween party at the same hotel where the RTP had been held. A lot of the RTP attendees opted to bring/change into costumes to participate in the chapter's fundraiser.

For the Autumn RTPs, the Region's annual Awards program is incorporated into the end of the day. See the Region's Policy and Procedures Manual for information about the Region's Awards program. Presenting awards at the end of the RTP generates interest in the awards program, encourages members to go back to their chapter and generate enthusiasm for submitting nominations the following year, and showcases the chapters before members. In the Autumn 2011, all six chapters in the Region were present to see a member of the Fort Monmouth Chapter named Member of the Year, the Brookhaven Chapter sweep the chapter awards, and Blue Cross Blue Shield recognized with the Private Industry Award, and a member of the IRS Brookhaven campus named the Federal Manager of the Year. The Regional Representative was presented with the Regional Manager's Award. Having the awards presented at the end of the RTP not only caps the event with excitement but helps to ensure members want to come for the next year's RTPs.

Conclusion

The Northeast Region's RTPs started slowly but have steadily gained momentum, earning high praise from attendees every year. These events are the Region's premier fundraising events. When the RTP ends with the requisite $1,000 balance, the Regional Board can determine whether it wants to move monies from the RTP account into the Scholarship fund and/or operating fund (checking account), and/or the special savings account to gain interest.

RTP Planning Committees have started out as comparative strangers but by planning's end and implementation's beginning, they are almost always a cohesive, smoothly functioning group who has each other's back to overcome the unexpected bumps in the road that always occur when planning training events of this magnitude.

The bottom line is to provide the best training experience possible to the largest group of members and guests possible and then sit back and enjoy it with them. ☺

Appendix A – Sample Planning Meeting Agenda

RTP Planning Committee Meeting
AGENDA
(Date)

Call-in Number:
Participant Code:

1. Meet-and-Greet
    a. Who will be there to meet the first arrivals?
    b. Theme baskets

2. Speakers
    a. VP for Congressional Relations – INVITED, tentatively confirmed – (name of responsible committee member)
    b. VP for Compliance – INVITED – (name of responsible committee member (NORCM))
    c. Elected official – INVITED – (NORCM)
    d. Motivational speaker – INVITED – (NORCM)
    e. Financial Planner – INVITED – (NORCM)
    f. Women's Health speaker – INVITED – (NORCM)
    g. Career/Work-related workshop speaker – INVITED (NORCM)

3. Facility where RTP will be held – NORCM
    a. Additional costs involved if we have breakout rooms?
    b. Rough guess-timate of cost for room rental and catering?
    c. When can we get into the room on Friday morning for set-up?
    d. Set-up for sponsor/vendor tables be inside the training room

4. Logistics – Identify the NORCM
    a. Coordinate flight information and pick-up/drop-off for out-of-town speakers
    b. Be the on-site go-to person for troubleshooting

5. Program Book - NORCM
    a. Will ask for ads

6. Budget - NORCM
    a. Submitted the written request for the $500 funding from National FEW as of (Date)
    b. Currently have $XXX.XX+/- in the RTP account

7. Marketing Update – NORCM
    a. Contact local newspapers for ad costs from links provided by other committee members who are local to the area

8. Conference bags – NORCM
    a. Solicit give-away items from our sponsors

9. Registration – Need at least two people to staff the table
    a. Will have a checklist of who has registered and paid vs who has registered by not paid
    b. Will have a cash box with "seed" money
    c. Make checks payable to "NERFEW"

10. Certificates – Identify the NORCM
    a. For Sponsors
    b. For Trainers
    c. For Presenters
    d. For Participants

11. Evaluations – Identify the NORCM
    a. Can be templated from previous RTPs

12. Catering – NORCM
    a. Breakfast items
    b. Luncheon items

13. Sponsors – NORCM
    a. Bay Path College (Carabine)
    b. Blue Cross Blue Shield (Stathoupolos)
    c. FedProtection.com (Wilson)
    d. FEW (Webster)
    e. FEW Foundation (Argana)
    f. GEHA (N'detti)
    g. Grantham University (Altland)
    h. Long Term Care Partners (O'Brien)
    i. Northeast Planning (Harrison)

14. Scholarship – Regional Scholarship Chair and NORCM
    a. Recommend scholarship criteria
    b. Administer the scholarship process
    c. Select a winner
    d. Request $75 from the FEW Foundation for scholarship winner to cover tuition and a little extra toward hotel and transportation (will be matched with up to $75 from the Northeast Region, for a total of $150 in scholarship, if needed to cover tuition, hotel, and transportation)

Sample Budget

Proposed RTP Budget
(RTP Date)

Available funds, as of (date): $
Anticipated income, as of (date):
$100 from Blue Cross Blue Shield
$100 from FedProtection.com
$100 from GEHA
$150 from Long Term Care Partners
$500 from FEW
$75 from FEW Foundation
$1,250 from $50 x 25 member registrants
$650 from $65 x 10 non-member registrants
$35 from $35 x 1 student registrant

Anticipated income, as of (Date): $2,960

Budgetary Line Items:

Item	Amount Allocated	Amount Expended
Catering for breakfast and lunch, based on 36 attendees	$1,080	
Room rental	$200	
Theme baskets X 6	$240	
Marketing	$100	
Printing	$200	
TOTAL EXPENDITURES	$1,820	

Projected Net Profit: $1,140[19]

NOTE: Expenditures requiring reimbursement *must* be listed on the Region's expense form, accompanied by a receipt.

[19] Will fluctuate as expenses and income fluctuate throughout the process. Final reconcilation of income and expenses will determine net profit.

Appendix C – Sample Agenda

Northeast Region (FEW)
Regional Training Program (RTP)
AGENDA

October 21, 2011

Time	Event	Lead Person
8:30-9:00 a.m.[20]	Registration	
9:00-10:15 a.m.	Workshop Title Introduction: (NORCM)	Name and Title of Presenter
10:15 -10:30 a.m.	Break/Visit Sponsors/Raffle Basket drawing	
10:30-11:45 a.m.	Workshop Title Introduction: (NORCM)	Name and Title of Presenter
11:45 a.m.-12:00 noon	Break/Visit Sponsors/Raffle Basket drawing	
12:00–1:00 p.m.	Networking Luncheon/Visit Sponsors/Raffle Basket drawing	
1:00-1:15 p.m.	Break/Visit Sponsors/Raffle Basket drawing	
1:15-2:30 p.m.	Workshop Title Introduction: (NORCM)	Name and Title of Presenter
2:30-2:45 p.m.	Break/Visit Sponsors/Raffle Basket drawing	
2:45-3:30 p.m.	Workshop Title Introduction: (NORCM)	Name and Title of Presenter
3:30-3:45 p.m.	Break/Visit Sponsors/Raffle Basket drawing	
3:45-4:45 p.m.	Workshop Title Introduction: (NORCM)	Name and Title of Presenter
4:45-5:00 p.m.	Presentation of Regional Awards/Certificates of Completion/Closing Remarks/Evaluations	Regional Manager

NOTE: Subject to change based on speaker availability.

[20] The Spring RTP generally starts earlier. The Autumn RTP will start later if held in Manhattan to accommodate attendees' commutes from various parts of NY.

Appendix D – Registration Checklists

Regional Training Program

www.nerfew.org

CHECK-IN LIST

Members

Last Name	First Name	Chapter	Payment Status

Non-Members

Last Name	First Name	Agency	Payment Status

Trainers

Last Name	First Name	Company	Payment Status

Sponsors

Company Name	Payment Status

Appendix D – Removable Checklist

RTP Checklist		
Item	Assigned To	Status
Agenda/Speakers		
Budget		
Catering		
Certificates		
Conference Bags		
Exhibitors		
Hotel information, if applicable		
Location/Facility		
Marketing		
Meet-and-Greet		
Program Book		
Raffle baskets		
Registration/Registrars		
Scholarship		
Sponsors		
Theme		
Transportation information, if needed		