



THE EMBROIDERERS' GUILD OF AMERICA

## **SOUTH CENTRAL REGION SEMINAR GUIDELINES**



## DOCUMENT CHANGE CONTROL

Date	Authors	Version	Change Reference
6/14/16	Shawn Miller	FINAL	Original document as approved by the SCR Board.
6/19/16	Shawn Miller	160619	Added cancellation policy including what to do with favors, kits, and other registration items; imbedded sample registration Excel document; noted faculty budget should include funds for printing proposals; adjusted pagination.
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Date	Authors	Version	Change Reference
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# ● THE EMBROIDERERS' GUILD OF AMERICA

## SOUTH CENTRAL REGION SEMINAR GUIDELINES

### INTRODUCTION

The purpose of a seminar is to promote excellence in needlework by:

- Scheduling workshops in a variety of techniques taught by highly skilled instructors
- Planning lectures, slide presentations and displays of specialized needlework
- Arranging important EGA-related meetings – educational and business

This South Central Region (SCR) Seminar Guidelines are presented as such – GUIDELINES - for the region chapters – with the exception of the South Central Region Policies, and the National Policies which are listed in Section I and are also placed throughout the document in **BOLD TYPE**. These policies **MUST** be followed.

For a complete reading of the National Policies on region seminars go to “document downloads” under the “members only” section of [www.egausa.org](http://www.egausa.org)

The printed guidelines are available on the South Central Region web page for reference by those chapters who host or wish to host a seminar.

This is a living document! Please direct any corrections, additions, or deletions to the SCR Seminar Mentor at [scr.seminarmentor@gmail.com](mailto:scr.seminarmentor@gmail.com).

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## SUGGESTED TIMELINE FOR SEMINAR PREPARATION

### **36 MONTHS (or more) – June**

- Seminar chair and treasurer selected and approved by region executive committee.
- Seminar committee jobs assigned to chapter members or, if region sponsored, committee jobs assigned to chapters.
- Initial loan made to seminar from region. (As of 6/2015, \$500)
- Site Selection. Confirm dates with National. Ask to be informed if another region has scheduled a seminar for the same dates.
- Seminar email addresses are created by the committee chairs as committees are filled. (See Appendix B for list of suggested email addresses.)
- Teaching fees are determined. These should be no less than what EGA National pays teachers in the same seminar year.
- Per diem and allowed incidentals is determined.

### **32 MONTHS – October**

- Initial budget approved (at the Fall executive committee (EC) meeting)
- Remaining loan made to the seminar treasurer (after initial budget has been approved). (As of 6/2015, \$4,500)

### **30 MONTHS – December**

- Seminar logo and theme selected by host unit.
- Logo sent to EGA product design and sales committee for approval. (See Appendix A for logo guidelines as of 2015.)

### **28 MONTHS – February**

- Seminar website is up with call for proposal information.
- Dean of faculty prepares a list of potential teachers. The list from the previous year may be used as a starting point.

### **26 MONTHS – April**

- Begin publicity for teachers.
- Request for proposals e/mailed to potential faculty. The request will direct the teacher to the seminar website for proposal information.

### **23 MONTHS – July**

- Reminder email to teachers to submit proposals is sent by dean of faculty

### **22 MONTHS – August**

- Prepare teacher contract.

### **21 MONTHS – September**



- Second reminder email to teachers to submit proposals is sent by dean of faculty

## **20 MONTHS – October**

- Faculty proposals due.
- Class selection committee chooses seminar classes. (The region director and SCR seminar mentor are de facto members of the selection committee. The RD, ARD or seminar mentor should attend the selection in person as an observer.)
- List of teachers selected is sent to region director. Region director sends list to national Director of Education for approval. Her email address may be found in Who's Who on the EGA website.

## **19 MONTHS - November**

- Notify faculty of acceptance or rejection with return of all hard copy proposals.

## **18 MONTHS – December**

- Faculty contracts due to dean of faculty.

## **17 MONTHS – January**

- Website/brochure data is gathered by host unit.

## **14 MONTHS**

- Initial website data is sent to webmaster. (April 1<sup>st</sup>)
- Website is developed in partnership with host unit and webmaster. (Month of April and May)

## **13 MONTHS – May**

- Complete seminar information is available on-line

## **12 MONTHS – June**

- Faculty preview at region seminar
- Registration opens

## **9 MONTHS – September**

- Cancel teacher contracts with low numbers
- Repay loan to region

## **8 MONTHS – October**

- Class assignments made.
- Letter confirming class status is emailed to teachers.
- Registrar's letter confirming class assignments and account status is emailed to students.

## **3 MONTHS – March**

- Registrar furnishes information collected from registration forms to various seminar committees.

### **8 WEEKS – April**

- Teacher sends student letter and pre-work where required.

### **6 WEEKS – April**

- Participant deadline for cancelling classes.

### **FINAL WEEK – June**

- Seminar!

### **60 DAYS AFTER – August**

- Final committee reports to seminar chair.

### **120 DAYS AFTER – October (In time for fall executive committee meeting)**

- Complete seminar report with financial statement attached due to region director and region treasurer.
- Financial summary completed and given to region treasurer for inclusion in region's Annual Financial Report and for region representative's information.
- Any funds remaining returned to region treasury.
- Seminar bank account closed.
- Region audit of seminar treasurer's financial records.

### **150 DAYS AFTER – November**

- Final reports are archived by region.

# SECTION I - NATIONAL AND SCR OVERVIEW

SCR Policies, Section 2, Revised June 2014

**National Policies and Procedures, Section VI, F, pp 2-6** (all National Policies in bold print)

South Central Region encourages member chapters to host a seminar. If no chapter volunteers for a particular year, the region Board shall make every effort to find a host Chapter. If none is found, the region Board shall host the seminar.

*Note: Throughout the Guidelines, the term "email" may be substituted for "letter". It is the host unit's choice to send such letters electronically, via USPS or other means.*

## **A. GENERAL**

- 1. All regions are encouraged to conduct educational seminars at such times and in such locations as shall meet the needs of its members.**
- 2. Every effort must be made to avoid scheduling region seminars in conflict with national board sessions and other seminars. To avoid conflicts, all EGA seminar dates shall be registered with EGA Headquarters before final scheduled dates are set.** Use Calendar of Events Form, found in SECTION IV – FORMS, CONTRACTS, LETTERS and WORKSHEETS.
- 3. A seminar executive committee, composed of key personnel, shall make major decisions.**
- 4. All contracts and services for region seminars, including faculty contracts, hotel contracts, bookstore, boutique, and any service that is necessary to conduct the seminar shall be approved and signed by the region director.**
- 5. Seminar logos must include the EGA trademark (logo). Prior to usage, seminar logos must be submitted to EGA Headquarters for approval.** See Appendix A for logo regulations as of 6/2015) (Ref. I.E.1. for specific logo information.)

## **B. SEMINAR CHAIR, TREASURER AND COMMITTEES**

- 1. The nominating committee of the host unit shall propose the SCR seminar chairman. This selection, subject to election of the host unit, shall be interviewed and approved by the SCR executive committee.**
- 2. The seminar chair shall be the liaison between the seminar committee and the region. The seminar chair is directly responsible to the region director and/or the region board.**

3. **The region director and seminar mentor are ex-officio [voting] members of the region seminar committee.**
4. All approved current and future seminar chairs will be full voting members of the SCR Board of Directors.
5. The SCR seminar chairman shall appoint dean of faculty and the following committee chairmen: assistant seminar chairman, treasurer, secretary, hotel chairman/liaison, registrar, hospitality, and other chairmen as needed. The treasurer shall also be interviewed and approved by the SCR executive committee.

### ***C. MEETINGS***

1. Minutes shall be sent to the region director, assistant region director, region treasurer and seminar mentor.
2. Adequate space will be provided at the seminar facility for region business meetings and other official functions that take place at the seminar.

### ***D. FINANCE***

1. **Region seminar chairmen and treasurers shall keep the region director and seminar mentor up-to-date concerning all aspects of the seminar and its finances.**
2. **Each request for loan monies shall be accompanied by an approved up-to-date budget. Monies for region seminars shall be requested from and approved by the region director or other officer specified in region policy.**
3. **Each seminar shall maintain a separate checking account.**
4. **Under no circumstances shall a seminar committee accept personal loans.**
5. The host unit shall be given \$500 of their subsequent loan after the seminar chair is approved. The financial budget must be approved by the SCR executive committee before the remainder of the loan money is honored. The SCR seminar budget will be prepared using a standard financial spreadsheet format.
6. Any excess of revenue over expenses from SCR Seminar shall be considered earned by both the region and the host unit since such excess is derived from region participation as well as the work of the local host unit. Any excess of revenue over expenses from SCR Seminar shall be divided as follows: 50% to be retained by the host unit and 50% to be paid to SCR. Such excess of revenue over expenses shall be computed after the SCR loan money has been returned to the region. All revenues and expenses will be considered for the 50%/50% split. This includes but is not limited to

nametag and other merchandise sales, merchandise night tables, teacher showcase fees, all class and studio time fees, mini-classes, etc. However, Region will continue to pay the actual costs in excess of funds collected from participants, up to the budgeted amount, for Region Day and any AV expenses for Region Day and/or the region annual meeting.

7. The local host unit may elect to sponsor a bookstore, boutique, Merchandise Event, or other approved activity; such as selling nametags or other merchandise. Any excess of revenue over expenses from these activities shall be divided with the Region in a manner prescribed in paragraph D.6. At Merchandise Event, a table shall be provided to the region at no cost, for whatever business the region may wish to conduct.
8. Any interest earned from the seminar bank account shall be divided in the manner prescribed in paragraph D.6.
9. Should any excess of expenses over revenue arise from the SCR Seminar, any deficit shall be borne as follows: 100% by SCR if the hosting unit has followed established Policies and Procedures or 50% by the host unit and 50% by SCR if the hosting unit has failed to follow Policies and Procedures.
10. Loan money from the region to the host unit shall be repaid to the region by September 30<sup>th</sup> in the year prior to the seminar.
11. **The seminar chair/treasurer shall prepare quarterly budgets and accounting reports of seminar expenditures. During the final year, monthly treasurer's reports shall be prepared. Region seminar treasurer's reports shall be sent to the region director, assistant region director and seminar mentor.**
12. **Budgets shall be revised as needs change. Whenever budgeted line items vary in a substantive manner, the change shall be reflected in a line item budget change sent to the region director, and/or another officer specified in region policy. When several line items have changes or whenever line items are added, a total budget revision shall be sent.**
13. **Teacher and Lecturer Payment Report Forms (1099 Misc) shall be sent to National headquarters within 14 days of the close of seminar.** (Note: EGA National has the Teacher's tax identification data on file.)
14. The host unit shall file a financial report and pay SCR its share of excess of revenue over expenses, if any, within 120 days of the end of seminar. **A copy of the final region seminar report, including the complete financial statement, shall be sent to the region director in time for the fall SCR executive committee meeting or within 120 days of the close of the seminar, whichever comes first.**

15. A copy of the final seminar financial summary shall be attached to the region's Annual Financial Report.

### ***E. WEBSITE/BROCHURE***

1. Color photos of class offerings shall be posted on the seminar website and will be accessible via a link on the SCR website at [www.egascr.org](http://www.egascr.org). Should a host unit elect to sponsor a Merchandise Event during the seminar, the national policy regarding participation and eligibility of items for sale shall be stated in the seminar website/brochure.
2. **Written permission to publicize copyrighted materials by way of a website shall be obtained prior to publication of such materials on a website. This written permission shall be included in any seminar teacher or education contract.**

### ***F. EXHIBITS.***

1. All exhibit entry fees shall be sent to the seminar registrar who shall forward such fees to the seminar treasurer.
2. Exhibit expenses shall be paid by the seminar treasurer or reimbursed by the treasurer to the exhibit chairman.
3. At the end of the exhibit, the exhibit chairman shall prepare a report of expenses, including an accounting for revenue and expenses with receipts.

### ***G. FACULTY***

1. **Only classes teaching techniques using the needle with an eye or judging, jurying, and exhibiting, teaching techniques, and classes which are art related shall be offered at seminars.**
2. **A teacher need not be EGA certified, an EGA member, or even an embroiderer to teach at a seminar.**
3. **A list of selected teachers shall be sent to the national director of education for review. If the name of a teacher on the listing is one who may not teach at a region seminar because of national contract violation, the National Director shall contact the teacher to urge the teacher to withdraw the proposal(s).**
4. **All teachers shall be paid the same amount for the same event. A daily rate shall be established and paid to all teachers with the total amount dependent upon the number of days of teaching.**

5. **A teacher may be contracted to teach for a part of the seminar. If teacher attends the remainder of the seminar, teacher shall pay the standard seminar rates for the portion attended.**
6. **Only members registered for the class may purchase the kit for that class.**
7. **The procedure for contracting with foreign teachers as outlined in the National Policies shall be followed.**
8. **The registrar shall make class assignments with no preference to anyone.**
9. **Teacher and lecturer Payment Reporting Forms (1099 MISC) shall be postmarked to EGA Headquarters within 14 days of the close of seminar.** (Note: EGA National has the Teacher's tax identification data on file.)
10. **Written permission to publicize copyrighted materials by way of a website shall be obtained prior to publication of such materials on a website. This written permission shall be included in any seminar teacher or education contract.**

## ***H. LOGOS***

1. Select a theme.
2. Inform the region Board of the selected theme.
3. Seminar Logos are usually designed in conjunction with the theme. Seminar logos shall include the EGA logo. The EGA logo is considered to be either the entire name - The Embroiderers' Guild of America, EGA or the EGA logo.
4. The seminar logo shall be submitted to EGA Headquarters, at [egahq@egausa.org](mailto:egahq@egausa.org), for approval prior to being used. The EGA logo MUST contain the registered trademark symbol, ®. NOTE: Ideally, this process should take place at least 30 months from date of seminar. See appendix A for additional information.

## ***I. MERCHANDISE EVENT***

1. **All sales at region seminars, except boutique/bookstore and EGA jewelry, shall take place on Merchandise Event. No teacher or seminar participant may sell items from her room or in a classroom.**
2. Merchandise Event shall be open to all EGA members whether or not they are registered at the seminar.

3. The host unit shall determine the eligibility of items for sale at the Merchandise Event. **All merchandiser's items must be embroidery related or approved by the seminar committee.**
4. **All merchants shall adhere to local and state sales tax laws.** (See merchandise chair duties for additional information.)
5. To facilitate the review of items to be offered for sale, all members signing up to sell will be sent additional information and will be asked to send a list of items for sale for committee approval prior to the Merchandise Event.
6. Chapters wishing to sell non-embroidery related items as a host unit fund raiser may do so only at the Merchandise Event with prior approval of the SCR Committee. Such approval must be requested in writing in advance of the seminar.

## ***J. NEWSLETTERS***

1. The publication of a newsletter is optional.
2. **The text of any seminar newsletter must be approved by the seminar chairman to be sure it follows EGA policies.**

## ***K. PUBLICITY***

1. **Written permission to publicize copyrighted materials by way of a website shall be obtained prior to publication of such materials on a website. This written permission shall be included in any seminar teacher or education contract.**
2. Responsible for placing ads in NeedleArts and other magazines as appropriate.
3. Responsible for submitting information to National for inclusion in the periodic emails sent to EGA members.

## ***L. REGION DAY***

1. Region Day activities shall be funded by the region, although the fees are collected by the seminar registrar.
2. Region will pay the actual Region Day costs in excess of funds collected from participants, up to the budgeted amount, for Region Day and any AV expenses for Region Day and/or the region annual meeting.
3. The seminar committee shall plan for and provide space for Regional Day activities.



4. **A volunteer member leading a bus tour at a seminar shall not be charged for a tour ticket.**

### ***M. MINI CLASSES***

1. Many host units choose to host mini classes prior to seminar. It is a great way to entice students to arrive a day earlier; thus, adding to the number of hotel room nights. Most mini classes are two hours or less and can be completed (mostly) in class. Most of the time, a host unit member is the teacher, but anyone may be contracted to teach.
2. Only host units (or others with permission from host unit) may hold mini-classes
3. Mini classes cannot compete with regularly scheduled seminar functions.
4. Any mini class revenues will be part of the region/host unit split.
5. It is recommended that an angel be assigned to any mini classes.

## SECTION II – ORGANIZATION

### ***SITE SELECTION***

The first and most important step a host unit or region takes when a seminar is being considered is to find a suitable location with adequate facilities. A hotel or conference center is preferable. For detailed information regarding hotels, refer to FACILITIES, SECTION III in this Guideline.

Once a suitable location is available, the host unit should submit a proposal to sponsor a seminar through the region director for the region board approval.

### ***DATE SELECTION***

**To avoid conflicts with national board meetings and other seminars, all EGA seminar dates must be registered with the National Office.** The region director submits the proposed dates to the National Office. SCR seminars are traditionally held the second or third week of June.

### ***CHAIRMEN***

Once a seminar chairman and treasurer are selected, their names are submitted to the region director. The proposed chairman and treasurer shall be interviewed and approved the SCR executive committee. **The seminar chairman will be on the host unit's board of directors.**

### ***COMMITTEES***

The seminar chairman appoints committee chairmen. The seminar committee consists of all appointed committee chairmen, the region director, and the seminar mentor. When the region itself is the host unit, it is a good idea to choose committee chairmen from different chapters, if possible.

The seminar executive committee should be formed; it should be composed of key committee chairmen. The committee may consist of the seminar chair, vice chairman, secretary, treasurer, dean of faculty, registrar, hotel liaison and hospitality. The region director and seminar mentor are ex-officio members of the seminar executive committee. Other committee chairmen, such as brochure, banquet, and class angels are at the option of the host unit committee and may report to any of the above. A sample organization chart is in Appendix D.

The seminar executive committee is the final decision-making body of the host unit. The seminar committee should be cognizant of the fact that it has “two bosses.” This committee is a committee of the region and, as such, reports to the region director. It is also a “local” committee and reports to the host unit board of directors.

## ***MEETINGS***

Meetings of the entire seminar committee should be scheduled as needed up to one year prior to seminar. More frequent meetings will be necessary after that date; probably once a month. Meetings can be held via conference call, Skype, email (reply all) or in person. These later meetings will be primarily for reporting purposes to keep the entire committee informed of details and the progress of the plans.

## ***COMMITTEE MEMBER OBLIGATIONS***

The host unit members will be expected to support and work on the seminar, both prior to and at the seminar. Special activities such as goody bags, favors, door prizes, the Merchandise Event, opportunity knocks, boutique, bookstore, or exhibits are conducted at the option of the seminar committee. When a host unit's board of directors is opposed to assisting with any non-mandated activity, the seminar committee should abide by those wishes.

## SECTION III - JOB DESCRIPTIONS

### ***EXECUTIVE COMMITTEE (EC)***

#### **REGION DIRECTOR (RD)**

1. Receive request to host a seminar from the host unit
2. Interview seminar chair and treasurer - provide each with a resume form (Found in SECTION IV – FORMS, CONTRACTS, LETTERS and WORKSHEETS.)
3. Ensure the Letter of Agreement (IC) of Financial Responsibility for seminar (SECTION IV – FORMS, CONTRACTS, LETTERS and WORKSHEETS.) is signed by the appropriate parties.
4. Participate in hotel site inspections
5. Sign all contracts, including hotel, hotel coordinator, teachers, and boutique
6. Notify headquarters of proposed seminar dates for approval (to avoid possible date conflicts with other regions)
7. Ensures an elected officer of the region (may be the region director) signs the seminar bank signature card
8. Act as the EC representative during the teacher selection process
9. Send teacher listing to national director of education for review
10. Work with seminar chair to send an invitation to National President as soon as the presiding President is elected and the seminar dates are known
11. Receive and review budget from treasurer
12. Receive minutes of meetings
13. Serve as an ex officio (non-voting) member of each region seminar committee
14. Work with the seminar chair to arrange the annual meeting and EC meeting during the seminar

## **ASSISTANT REGION DIRECTOR**

1. Receive and review budget from treasurer
2. Receive minutes of meetings
3. Serve in place of the RD as directed by the RD or the EC.

## **SEMINAR MENTOR**

1. Serve on the region board
2. Serve as chair of the seminar mentor Committee which consists of the region's seminar Hotel Liaison, the region's seminar webmaster and all active seminar chairs.
3. Serve as the liaison between the seminar chair and the region to include being versed in seminar guidelines in order to guide the seminar chairs in getting organized and answer any questions that may arise
4. Serve as an ex officio (non-voting) member of each region seminar committee
5. Receive and review budget from treasurer
6. Receive minutes of each seminar meeting

## **SEMINAR CHAIRMAN**

**The nominating committee of the host unit shall propose the SCR seminar chairman. This selection, subject to election of the host unit, shall be interviewed and approved by the SCR executive committee.** (SCR Policies, June 2014) The seminar chairman shall be provided a copy of the Region Seminar Guidelines; located on the SCR website.

## **QUALIFICATIONS**

1. A seminar chairman should be a person who previously has an experience in an executive position.
2. She should be capable of dealing with large groups of people.
3. She should be able to delegate responsibilities.
4. She should not currently be president of a host unit or a region director.

## **DUTIES**

1. **The seminar chairman is liaison between the seminar committee and the region.**
2. **The seminar chairman is directly responsible to the region director and/or the region board.**
3. Serves on the region's executive committee and Board as a voting member.
4. Provides a resume to the region director. (The resume form may be found SECTION IV – FORMS, CONTRACTS, LETTERS and WORKSHEETS.).
5. Reports to and directs her questions on seminar policy to the region director or seminar mentor for interpretation of policy.
6. Is an ex-officio member of seminar sub-committees and works with each chairman, interprets national and/or region policy, answers questions and monitors progress toward stated goals.
7. Works with the facility chairman to coordinate the activity/plans of every seminar committee.
8. Reports all activities in a timely manner to the region director. Maintains contact with the region director and with past and future seminar chairmen.
9. Works with committee chairs to ensure the seminar is publicized.

10. Sends invitations to officers and guests who will be seated at a head table or at special tables of honor.
11. Ensures all seminar tasks are performed in the timely manner. The chair may find the task list an invaluable tool. (See Appendix C for a sample task list. The chair may wish to confer with the immediate preceding chair for an updated task list.)
12. Ensures SCR seminar equipment is transported from the current seminar location to the next seminar location and stored appropriately. This equipment includes white boards, easels, markers, extension cords, etc. As of 2016, the equipment may be transported in a full-size SUV. Please check with the current seminar chair for existing volume requirements.

## MEETINGS

1. Schedules regular meetings of the above committees.
2. Chair the seminar committee and the seminar executive committee and reports all activities to the assistant region director and seminar mentor.
3. As a member of the local (host) and region boards, she is expected to attend board meetings and report regularly on seminar plans.
4. Any action to be taken by the seminar committee that requires a commitment from the host unit should be coordinated with the host board of directors.
5. Coordinate with facilities chair to provide adequate space for the region business meeting and other official functions that take place at seminar. This list can include the region board meeting, space for exhibits, and fund-raising activities.
6. Schedule any wrap up meetings to be held during seminar. Issue invitation by phone or email to the next seminar chairman to attend all meetings and planning sessions occurring during seminar.



## FINANCE

1. Works with the treasurer, registrar, and seminar chair to establish registration fees for classes, studio time and a non-participant fee. The non-participant fee will be offered to at least two participants from the next seminar year to allow for registration table staffing. The non-participant fee should include all meals, mementos (such as tote bags and pins) and favors offered to regular participants.
2. Works with the treasurer to establish a seminar budget. Requests loan monies from region, monitors expenditures and helps prepare budget revisions as needed.
3. The seminar chairman and treasurer will keep the region director, assistant region director and seminar mentor up to date concerning all aspects of the seminar and its finances.
4. At the close of seminar, arranges for an audit of the seminar books before it is submitted the region director.
5. Signs Letter of Agreement (IC) of Financial Responsibility for seminar (SECTION IV – FORMS, CONTRACTS, LETTERS and WORKSHEETS.)

## HOTEL

1. Works with the Facilities coordinator to negotiate a contract and **submits this contract to the region director for signature.**
2. Prepares an agenda for each meal which provides for greetings from ranking officers, introductions, invocation, announcements. Participants should be consulted prior to finalizing the agenda and they should be provided a copy so they will know what is expected of them. Sample agendas are in Appendix E.
3. Presides at each banquet or special function.
4. Works with the region board to facilitate region events that are held in conjunction with the seminar.

## **BOUTIQUE/BOOKSTORE**

1. Works with the boutique and/or bookstore chairman to negotiate a contract, **submitting this contract to the Region Director for signature.**

## **CONTRACTS**

1. Ensures that **all contracts and services for region seminar, including faculty contracts, are approved, and signed by the region director.**
2. Ensures that all contracts and services other than faculty are reviewed by the region executive committee.

## **REPORTS**

1. Ensures that reports are sent in a timely manner to the region director, assistant region director and seminar mentor.
2. Directs preparations of final seminar sub-committee reports.
3. Ensures that the final region seminar report, including the complete financial statement, will be sent to the region director and SCR seminar mentor within 120 days of the close of the seminar.
4. Meeting notices and minutes will be sent to the region director and any other officer designated in region policies.

## **SEMINAR VICE CHAIRMAN**

1. Acts in any capacity requested by the seminar chairman.
2. May assist in budget preparation.
3. Maintains familiarity with all phases of seminar planning.
4. Serves on the seminar executive committee.
5. Serves as coordinator for special meetings.
6. May coordinate with region officers to arrange times and facilities for special business meetings needed during the seminar. May act as liaison to assist in any special problems relating to these meetings.
7. If an exhibit is held, oversee exhibit plans with the exhibit chairman.
8. Prepare a final report to be sent to the seminar chair within 60 days of the close of the seminar.

## **SECRETARY**

1. Records verbal agreements, takes notes of important discussions, and takes minutes at committee meetings.
2. Maintains a master file of the above. Sends copies of the minutes to the seminar chairman and the region director, and members of the seminar committee in a timely manner.
3. Writes and sends correspondence requested by the seminar chairman.
4. Maintains a master file of correspondence and other data for the seminar.
5. Submits meeting notices and minutes to the region director and any other officer designated in region policies.

## TREASURER

1. The treasurer should be well versed in the Region's Policies and Procedures.
2. The treasurer shall be interviewed and approved by the SCR executive committee. (SCR Policies, June 2014. Note: at this printing, the treasurer does not have to be bonded)
3. Provide a resume to the region director. (The resume form may be found in SECTION IV – FORMS, CONTRACTS, LETTERS and WORKSHEETS.)
4. Work with the seminar chair and vice chair to prepare and monitor a seminar budget. The budget should be reviewed and approved by the seminar executive committee. Once approved, it should be submitted to the region director for SCR EC approval.
5. After loan money (advance) has been requested by the host unit, and received, opens a checking account and orders checks which are imprinted with the " *(host unit name) seminar.*" The checking account shall have at least two (2) names on the signature card, one of whom will be the region director or an elected officer of the region. It is recommended that the Treasurer, Seminar Chair, and the Region Director are all on the bank signature card.
6. Provide each committee chair with a budget.
7. Maintain an accounting of all monies received and all expenditures. A double-entry accounting system is recommended.
8. Prepare quarterly financial statements for the seminar chair, for each committee chair, and for the region director. In the final year, monthly reports will be prepared and sent to the region director, ARD, seminar mentor and/or another officer specified in region policy.
9. Pays all bills promptly.
10. Deposits all receipts promptly.
11. Repay loan money to SCR by September 30<sup>th</sup> of the year prior to seminar.
12. Works with the registrar during registration and establishes a method of reporting each receipt to the treasurer by the registrar.
13. Create a seminar reimbursement form. Distribute the form to all members of the committee. See SECTION IV – FORMS, CONTRACTS, LETTERS and WORKSHEETS for a sample form.

14. Process refunds promptly after written notification from the registrar and approval of the seminar chair.
15. Works with the merchandise event chairman to determine the applicability of the local sales tax laws. Ensures sales tax information is distributed to all the Merchandise Event vendors, prior to the Merchandise Event, in a clear and concise manner.
16. Works with the dean of faculty to prepare teacher expense reports. It is recommended that the prepared expense reports are sent to the teachers 14 days prior to seminar for their review. If there are no corrections, the teacher checks may be prepared prior to seminar. Note: teacher per diem (if any) may be paid via a prepaid Visa/American Express/MasterCard gift card. See SECTION IV – FORMS, CONTRACTS, LETTERS and WORKSHEETS for a sample form.
17. Prepare the final financial statement in time for the fall SCR executive committee meeting or within 120 days of the close of the seminar, whichever comes first.
18. Prepare a financial summary for the SCR treasurer to attach to the region's Annual Financial Report to National and for the region representatives' information.
19. Sends the seminar ledgers, check books, bills, receipts, and reports to the region treasurer for audit and storage.
20. Sample budget income and expense worksheets and a report form are can be found in SECTION IV – FORMS, CONTRACTS, LETTERS and WORKSHEETS.

## **FINANCE NOTES**

1. Selects a bank that offers the greatest benefits. See Appendix F – Information to Open a seminar bank account for additional information.
2. Seminar accounts must be separate from other EGA accounts: chapter, region and national.
3. Designates the account as non-profit. Use the E.I. number of the host unit. Note: As of 2016, entities no longer have a choice on how their account will be listed; new banking laws dictate the account name agree with the name on the Fed Tax ID certificate. Again, refer to Appendix F for additional information.
4. As of 2016, new banking regulations indicate name on checks need to agree with name on account. Texas requires a DBA certificate. This will allow the checks to be imprinted with SCR Seminar 20xx.

5. **Each request for loan monies will be accompanied by an up-to-date budget. Monies for region seminars will be requested from and approved by the region director and the region executive committee.**
6. **All seminars will maintain a separate checking account.**
7. **Under no circumstances will a seminar committee accept personal loans.**
8. **The final region seminar report, including the complete financial statement, will be sent within 120 days of the close of the seminar to the region director. A copy of the report must be attached to the annual financial report submitted to the National Office by the region and the sponsoring body.**
9. All the region officers, except the region director, pay their own way to a seminar.
10. Set up a mechanism to accept credit cards as payment. This may be Square, PayPal or other service. If using PayPal, apply for a non-profit account as this provides significant savings. See Appendix G for additional information.
11. When creating the workplan/budget, be sure to allow for the credit card fees as they will be significant. Assume that all revenues will be received via a credit card.
12. If the seminar hotel contract is dependent on the number of sleeping nights used by the Seminar, participants who are not staying in the hotel at the contracted seminar rate should be charged a “facilities use fee”. This fee should be no less than the contracted amount of one night in the hotel plus any taxes and fees.



## DEAN OF FACULTY

1. Selects a committee of no fewer than five members. The region director or seminar mentor and seminar chair are members of the committee.
2. Prepares an invitation to teach and/or a notice to be placed in appropriate publications, such as *NeedleArts* and eNewsletters sent out by National. The invitation should direct the teachers to the seminar website where all proposal materials are located. To submit a notice to EGA for inclusion in the eNewsletter, send an email to the EGA Electronic Media Coordinator no later than the 14<sup>th</sup> of the month in odd numbered months. As of June, 2017, the Media Coordinator is Rand Duren. His email is [rduren@egausa.org](mailto:rduren@egausa.org). However, please double check the EGA website for up-to-date contact information.
3. Works with the faculty committee and prepares a list of prospective teachers. This should include working with previous faculty chairs to obtain their list of prospective teachers.
4. Maintain faculty email addresses; making corrections as needed and removing teachers who no longer wish to be notified of upcoming seminars.
5. Note: The dean of faculty may want to contact NETA (National Embroidery Teachers Association) to solicit proposals from teachers. As of 2/2024, the website is <http://www.embroideryteachers.com/>.
6. With the faculty committee, prepares mailing to prospective teachers to include information for submitting proposals, with a copy to the region director and seminar mentor. The mailing should direct the teachers to the seminar website where all proposal materials are located. (See SECTION IV – FORMS, CONTRACTS, LETTERS and WORKSHEETS for a sample email.)
7. Receives proposals submitted; prepares them for review by the faculty committee. Note: The faculty budget should include funds to print and organize all emailed proposals.
8. Sends a list of teachers submitting proposals to the region director, who sends it to the national Director of Education.
  - a. **If the [national] Director sees the name of a teacher who may not teach at a region seminar because she has violated a national contract, she would contact the teacher (who has already been told not to submit), and ask her/him to withdraw her/his proposal.**

9. Works with seminar mentor to determine the number and types of classes to select.
10. Establishes a review system to be followed by faculty committee. (See SECTION IV – FORMS, CONTRACTS, LETTERS and WORKSHEETS for sample spreadsheet.)
11. Works as a member of the faculty committee, rates proposals and selects a tentative seminar faculty.
12. Prepares the list of selected faculty and submits list to the region director for approval.
13. Sends a teacher's contract, with a letter of acceptance, or sends a letter of non-selection with returned proposals. All mailed stitched returned proposals shall be sent back with a signature required by the recipient. All teacher contracts are signed by the region director.
14. Returns submitted hard copy proposals to teachers (request signature required for delivery).
15. Prepares a teacher information packet, to include the website for the brochure and date reminder list for teachers and for the committee.
16. Maintains a log, noting information given out, to whom, and when.
17. Receives all materials from the teachers as spelled out in their contracts. Checks all submitted material for accuracy and compliance with the contract.
18. Works with the brochure chair and the webmaster to arrange for pictures of teaching pieces, class description material and teacher resumes. Pictures may be sent to the dean of faculty electronically.
19. Arranges preview of seminar class pieces at prior seminar.
20. Maintains contact with the registrar, monitors class size, and contacts the teachers as needed to cancel or change class sizes.
21. Plans for a teacher meeting at the seminar to introduce class angels and discuss seminar policies.
22. If the teacher so desires, receives the teachers' kits, and arranges to transport them to the facility, or arranges with the facility for a storage area for the kits to be sent directly to the facility.
23. Works with the treasurer to prepare teacher expense reports. It is recommended that the prepared expense reports are sent to the teachers 14 days prior to seminar for their review. Note: teacher per diem (if any) may be paid via a prepaid Visa/American

Express/MasterCard gift card. See SECTION IV – FORMS, CONTRACTS, LETTERS and WORKSHEETS for a sample form.

24. Works with the class angel chair to assign class angels and coordinate their activities.
25. Works with the facility coordinator to assign classrooms and for audio-visual equipment needed during the seminar.
26. Works with the facility coordinator to arrange space for Teacher's Showcase.
27. Monitors classes during the seminar and assists as needed.
28. Works with seminar treasurer to prepare Payment Reporting Form (1099-Misc) to file with EGA National within 14 days of close of seminar. Include copy of each teacher contract, all receipts used to compute check total, and Original Payment Report form. (Note: EGA National should have the Teacher's tax identification data on file.)
29. Prepare a final report to be sent to the seminar chair within 60 days of the close of the seminar.

## **FACULTY SELECTION COMMITTEE**

1. This committee, as well as the dean of faculty, needs to be selected carefully. It should consist of members who have had experience attending seminars and who have expertise in a variety of stitching techniques. The Committee should consist of no fewer than five (5) members.
2. The region director or seminar mentor and the seminar chair are members of the Faculty Selection Committee.
3. The Committee is responsible for selecting classes which reflect a broad spectrum of stitching interests in the region.
4. NO TEACHER WHO PLANS TO SUBMIT A PROPOSAL TO TEACH SHOULD BE INCLUDED IN THE FACULTY SELECTION COMMITTEE.
5. The names of the Faculty Selection Committee should not be made public.
6. Some host units choose to have a “preview session” of the class proposals for host unit members who are not part of the Faculty Selection Committee.
7. The recommended selection process is as follows:
  - a. Prior to the selection meeting, the committee should determine the number and target variety of classes to be offered. For example: 10 teachers with x% canvas, y% samplers, etc. Final variety will be governed determined by teacher submissions.
  - b. Optionally, the proposals are emailed to the selection committee approximately 2 weeks prior to the selection meeting. The selection committee then reviews the proposals at their leisure and electronically submits their rankings (see SCR’s Proposal Rating form) to the Dean of Faculty prior to the selection meeting.
  - c. Using the SCR’s Proposal Rating form, each committee member reviews the pieces, and gives it a ranking from 1-5 with 5 being the highest rating.
  - d. If the proposals are not prescreened, it is highly recommended there is a designated impartial “score keeper” to enter the scores in Excel or other electronic spreadsheet as each committee member finishes their ranking. (Please contact the prior Dean of Faculty or the SCR Seminar Mentor for an updated file.)
  - e. After the scores are entered, the data is examined and an average score is obtained. (Note: Any anomalies should be discussed with the seminar chair and dean of faculty. Scores may not be considered in the average if necessary. Example: if a committee member only scores 0s and 5s.)
  - f. The committee will then discuss the proposals with the top scores. If the target number of teachers is 10, then at least the top 15 should be discussed. In other

words, the committee should discuss the target number of teachers plus an additional 33% of the target number of teachers.

- g. Care should be taken to balance the type of techniques. Also, each teacher should be contracted to teach all class days. For example: if seminar is 3 days and a teacher submits 2-day classes and 1-day classes, the committee should select both a 2 day and a 1-day class.

## **h. REGISTRAR**

1. The registrar should have a working knowledge of Excel, Word, and email.
2. Determine methodology for recording registration information.
3. Work with the webmaster to prepare a registration form. Include on the form and on the website the registrar's name, address, telephone number and email address (scr20xxregistrar@gmail.com).
4. The registrar should attend the seminar in the prior year to manage on site early registration.
5. Receive class registrations from registrants either electronically or by mail, recording date received.
6. Work with treasurer to properly record payments received. Coordinate bank deposits with seminar treasurer.
7. Prepares a list of class assignments based upon choices of participants and date received.
8. Notifies dean of faculty and seminar chair of classes not meeting the minimum registration requirement for a decision concerning cancellation. Cancellation should be done before the final class lists are made. Cancel classes one at a time as reassignment of students may bring a low class up to the minimum.
9. Notify other committee chair of registered participants in special events.
10. Answers phone and electronic questions concerning registration.
11. Prepares and sends seminar acceptance and class assignments to participants. This can be done electronically or by mail, as determined by the seminar committee.
12. Prepares and sends invoices to participants.
13. Prepares waiting lists to register if seminar is oversubscribed. This is not a waiting list for class assignments.
14. Sends kit fee information to participants either electronically or by mail. Receive kit fee payments.
15. Makes copies of class lists for dean of faculty to meet deadline for sending class lists to teachers.

16. Work with notebook chair to prepare list of participants.
17. Prepares roommate list, as requested.
18. Prepares list of participants for various committee chairs for any special events, i.e., the Merchandise Event, teachers showcase.
19. Coordinate with hospitality chair to prepare registration packets, which includes the notebook and tickets to seminar events.
20. Request the appropriate special designation ribbons from EGA headquarters. Current available ribbons are:
  - a. First-time national seminar attendee
  - b. Chapter president
  - c. EGA master craftsman
  - d. EGA-certified teacher
  - e. EGA-certified graduate teacher
  - f. EGA-certified judge
  - g. EGA-certified master judge
  - h. EGA-certified appraiser
  - i. EGA life member
  - j. MyEGA member
  - k. Crown Jewels member
  - l. Gold Thread Award recipient (past or present)
  - m. Fiber Forum member
  - n. Region Directors
  - o. Seminar Committee
  - p. EGA Executive Committee
  - q. Nominating Committee
  - r. Volunteers
21. Coordinate with the hospitality chair to arrange for a registration area at the facility, preparing procedures and training for volunteers.
22. Maintain a list of emergency contact information in the seminar office.
23. Be available to answer questions during registration at the seminar.
24. Provide a time for early registration for the region Board or arrange to pass out registration packets to the Board members as they arrive. Obtain a list of early arrivals from the region director.

25. Collect registration packet, tote bag, pin, favors, class kits (if released by teacher), etc. for students who are unable to attend seminar and are not due a refund. These items may be released to a fellow chapter member, family or other person designated by the student. If no one is available to pick up the items, they should be mailed to the student at the expense of seminar.
26. Prepare a final report to be sent to the seminar chair within 60 days of the close of the seminar.

NOTE: Students enrolled in EGA seminars do not have to be members of EGA. Each seminar committee should determine the fee charged, if any, to non-members.



## REGISTRATION FORM

1. Each form will have a space for
  - a. **Participants to note if they are an Officer, Board Member, or Chapter Representative.**
  - b. A cancellation policy – deadlines for refunds and penalties for canceling after the deadline. A suggested policy is no refunds after the kit numbers are given to the teachers. Additionally, a change fee may be assessed for changes after a given date. Refer to the prior year seminar for the most recently used policy.
  - c. EGA number
  - d. Registration days/dates
  - e. Class selections

## REGISTRATION PROCEDURES

1. Well ahead of the registration date, set up procedures for registering on line (optional) and by mail, and for recording registration data. Work with the treasurer to establish a system of checking and reporting the fee section of the form.
2. Check the registration form to ensure the information is correct and that there are no mistakes in math. Note an incorrect payment amount on the registration form and contact the participant to correct needed items. This can be done electronically.
3. Maintain a backup copy of each registration. **A master file of registration should be kept in one place and never separated.** Send a copy of registrations to the treasurer and to committee chairs, as needed. This can be done electronically.

## FACILITIES COORDINATOR

1. Host units may use a paid facilities coordinator or a site selection committee headed by a host unit's facilities chairman.
2. Negotiating contracts with the hotel/college is the duty of the seminar chairman, hotel chair (or facilities coordinator) and the region director.
3. In February 2015, the SCR board endorsed Amanda Garcia-Slater as the SCR seminar facilities coordinator to negotiate with the hotel and coordinate hotel activities, i.e., teaching rooms, food, during the seminar. Each seminar may choose to hire her or not. Her fees would be paid by the seminar and must be included in the budget. The host unit would recommend to the paid coordinator area hotels which are suitable for a seminar.
4. SCR generally has 175 to 250 attendees. Hotels should have at least 150 sleeping rooms and 12-18 classrooms plus space for additional activities.
5. The facility must have:
  - a. An adequate number of rooms that can be blocked off as sleeping rooms for the time required.
  - b. Dining facilities to service the anticipated attendance for a banquet and purchased meals.
  - c. Well lighted classrooms of adequate size which are as soundproof as possible.
  - d. A suite or guest room with attached meeting room will be provided for the region director for the duration of the seminar. The seminar is responsible for either using a comp hotel suite/guest room or paying for the suite/guest room for the region director. The region director is not required to have a roommate; however, if the region director chooses to have a roommate who is attending seminar, the roommate must pay the commuter fee as part of his/her seminar registration. If the region director's roommate is not participating in seminar, there is no extra charge to the roommate.
  - e. The host unit should outline the site requirements for the hotel sales personnel and the facilities coordinator so they can tell whether they can accommodate the group.
6. **Since official meetings are held in conjunction with seminar, space must be held open for officers, board members, and representatives from each chapter. Space will be held only until a certain date. Only space at the seminar and not a specific class will be assured.**

7. Basic information and guidelines for facilities can be found in SECTION IV – FORMS, CONTRACTS, LETTERS and WORKSHEETS.
8. Other duties include:
  - a. Request written proposals from the hotel sales personnel.
  - b. Report to the seminar executive committee the final site selection.
  - c. Works with the seminar chairman and the region director to finalize a contract once a site selection has been made by the seminar executive committee.
  - d. Acts as the seminar committee contact person with the facility, arranging for all site visits and all meetings with the staff. Maintains contact with facility personnel and updates requirements as necessary.
  - e. Works with the food chairman to coordinate with facility personnel for all food arrangements.
  - f. Obtains a floor plan of contracted public space.
  - g. Coordinates with transportation chair regarding transportation and parking provided by hotel.
9. Works with committee chairmen to determine space assignments, such as:
  - a. Dean of faculty for classrooms
  - b. Boutique/bookstore chairmen
  - c. Registrar for signing in
  - d. Food chair for meals
  - e. Hospitality desk
  - f. Merchandise sales
  - g. Opportunity knocks
  - h. Next seminar classes
  - i. Teacher's showcase
  - j. Local host unit classes
  - k. Region meeting spaces

10. Takes the final seminar schedule and room assignments approved by the seminar committee and prepares a master schedule of facility usage for the seminar chairman and the facility.
11. Assists the seminar chairman during seminar with any problems in room availability or set-up requirements.
12. Prepare a final report to be sent to the seminar chair within 60 days of the close of the seminar.

## **HOSPITALITY**

1. It is recommended that the hospitality chairman have co-committee chairs for each major area, such as door prizes, favors, decorations, and volunteers.
2. Arrange for the region director and the National President to be met at the airport and taken to the hotel or provide information on convenient, reasonably priced shuttle/taxi services available.
3. Coordinate with the dean of faculty to greet each teacher as they arrive.
4. If seminar committee is planning gifts for the faculty, i.e., welcome basket, a similar gift should be provided for the region director.
5. Coordinate with the registrar to provide a time for early registration for the region board.
6. If a social function (kick back party) is scheduled, either before, during or after the seminar, for the region board members, seminar committee, and/or teachers, invitations should be sent well in advance of the function to allow each invitee to plan her time schedule. It is entirely up to the host unit to decide whether to host or not host a social function.
7. Coordinates with registrar to prepare registration packets, including notebook, ribbons, pins, totes, tickets to special events, meal tickets, maps, area information, etc.
8. Works with the seminar chair to prepare a seating chart should the seminar committee choose to assign seats at a meal. Receives from seminar chair any head table seating requirements. Determines special seating arrangements for honorees, i.e., past national presidents, past region directors, and/or current members of the region board of directors.
9. Protocol for guests at the seminar, seating at meals, introductions of guests, receiving lines, etc., can be found at SECTION IV – FORMS, CONTRACTS, LETTERS and WORKSHEETS and under the member's only section on the national website, [www.egausa.org](http://www.egausa.org), Manuals & Guides, Region Seminar Guidelines, Section 1, C. pgs 7-9.
10. Prepare a final report to be sent to seminar chair within 60 days of closing of seminar.

## **INVITATIONAL YEAR (one year prior to seminar)**

1. Gather & submit ideas for a favor which promotes the seminar. A favor is usually given to participants at the previous seminar at the last luncheon served.

2. Gather & submit ideas for table decorations for the last luncheon served.
3. Gather ideas & prepare for entertainment to promote the seminar at the last luncheon served.

## **SEMINAR PINS**

1. Order seminar lapel pins.
2. Participants will receive these pins at registration.
3. A possible source is the Plano Pin Company (this is not an endorsement for using the company).

## **VOLUNTEERS**

1. Determine where volunteers are needed
2. Recruit volunteers
3. Assign volunteers times and stations
4. Make sure volunteers know their assigned duties and have whatever is needed to fulfill duties
5. Make sure volunteers are at assigned locations during the seminar
6. Be available for questions, needs, emergencies, etc.
7. Send thank you notes to volunteers after seminar



## **TOTE BAGS (Optional)**

1. Gather ideas.
2. Order tote bags for distribution at registration.
3. Advertising items of local interest may be accepted for inclusion in the tote bags.
4. Plan for a secure storage space close to the distribution area.
5. If the tote bags are not large enough for a typical project, or if tote bags will not be distributed, attendees should be notified in advance.

## **DOOR PRIZES (Optional)**

1. Determine how many door prizes are to be distributed.
2. Compile a list of vendors to solicit
3. Receive door prizes/donations
4. Prepare door prizes for distribution
5. Prepare tickets for drawings
6. Secure volunteers to help distribute door prizes at meals
7. Write thank you letters to donors

## **FAVORS (Optional)**

1. Gather ideas for meal favors (usually two lunches and one banquet). Favors may be stitched or purchased. The last meal is usually done by the next year's seminar committee to promote their seminar. Coordinate with their hospitality chair to confirm.
2. Prepare, order, and procure meal favors
3. Secure volunteers to hand out favors for each meal

## **DECORATIONS (Optional)**

1. Optional – you may wish to use the hotel’s table decorations
2. Gather ideas, prepare, and procure table decoration for the meals.
3. Prepare the tables before each meal. One decoration may be used throughout the seminar, or a new decoration may be used at each meal.
4. Dismantle table decorations after each meal
5. Secure volunteers for help before and after meals with decorations

## ***COMMITTEES***

### **BOOKSTORE (Optional)**

1. The bookstore is an optional event at a SCR seminar. A percentage of gross sales or an agreed upon set fee in the time period as contracted are paid to the host unit(s) and split with Region in the prescribed manner. Books may be obtained from manufacturers or a book dealer who may agree to supply a wide selection of embroidery related books. Note: As of 6/2015, Ruth Kern is no longer providing books for a book store.
2. Act as a liaison between the seminar committee and the selected supplier.
3. Refer to the National sample contract for contract stipulations (see SECTION IV – FORMS, CONTRACTS, LETTERS and WORKSHEETS)
4. Coordinate with the seminar chairman and facilities coordinator to select a room at the seminar facility that will meet the bookstore needs and security.
5. Prepare a room set-up plan to be given to the facilities coordinator. The plan should include the location and number of tables needed. Consider traffic flow. A secure separate entrance and exit are recommended.
6. If required, provide volunteers for the stocking and operation of the bookstore during the hours specified in the formal contract.
7. If required, provide volunteers to assist with the set up and break down of the bookstore area(s) in accordance with the agreed upon time schedule.
8. If required, provide volunteers to help sales staff (hired or volunteer) to assist with sales during the time periods agreed upon in the contract.
9. Prepare a final report to the seminar chair within 60 days of the close of the seminar.

## **BOUTIQUE (Optional)**

10. The Boutique is an optional event at a SCR seminar.
11. A percentage of gross sales or an agreed upon set fee in the time period as contracted are paid to the host unit(s) and split with Region in the prescribed manner.
12. A sample boutique contract can be found at SECTION IV – FORMS, CONTRACTS, LETTERS and WORKSHEETS.
13. Act as a liaison between the seminar committee and the selected shop owner.
14. Coordinate with the seminar chairman and facilities coordinator to select a room at the seminar facility that will meet the boutique needs and security.
15. Prepare a room set-up plan to be given to the facilities coordinator. The plan should include the location and number of tables needed. Consider traffic flow. A secure separate entrance and exit are recommended.
16. If required, provide volunteers for the stocking and operation of the boutique during the hours specified in the formal contract.
17. If required, provide volunteers to assist with set up and break down the boutique area(s) in accordance with the agreed upon time schedule.
18. If required, maintain a sales staff (hired or volunteer) to assist with sales during the time period agreed upon in the contract.
19. Prepare a final report to the seminar chair within 60 days of the close of the seminar.

## **BROCHURE**

1. The brochure is published on the internet by the seminar webmaster. No printed copies are needed. Chapters are responsible for printing the brochure for those members who do not have internet access. It is recommended that either the brochure chair or the assistant be an experienced writer or editor.
2. A seminar brochure shall contain:
  - a. Seminar logo, date, theme, and place prominently displayed
  - b. Schedule of activities
  - c. Welcome letters from region director and seminar chair
  - d. Any special activities, and general information regarding hotel, bookstore, boutique, exhibit, etc.
  - e. Clear photos and course descriptions, including biographies of teachers and student proficiency level.
  - f. Registration Information
  - g. Registration Form
  - h. Hotel information
  - i. Classroom etiquette
  - j. Starting with Seminar 2020, battery powered lights are required.

## **DUTIES**

1. Develops a brochure timeline working backward from known deadlines. This timeline shall be distributed to all seminar chairmen. Deadlines are not optional!
2. Works within budget provided by seminar committee, making timely reports to seminar chair and seminar treasurer.
3. Collects data for brochure from respective chairmen. Make sure the registrar's name and contact information are on registration sheet and on the website. The email address for the registrar will be scr20xxbrochure@gmail.com. If Opportunity Knocks is an event, also include the chair's contact information.
4. Coordinates with dean of faculty to obtain pictures of the class selections.

5. Edits and/or writes class descriptions from descriptions submitted by faculty members.
6. Verifies the information by comparing proposal, student letter, with brochure copy submitted by teacher.
7. Submits final copy of biographical information and class description to faculty for verification.
8. Arranges for brochure content to be proofread by at least two others; one should be a person who can ensure style consistency.
9. Proofreads website content, making needed corrections prior to go live/publishing.
10. Submits final copy of content to seminar chair for approval.
11. Submits brochure content to webmaster for publishing.
12. Prepare a final report to be sent to seminar chair within 60 days of closing of seminar.
13. Share information from III.2.A – III.2.D above with the notebook chair to ensure consistency.



## CLASSROOM ANGELS CHAIRMAN

1. Works within budget provided by seminar committee, making timely reports to the seminar chair and seminar treasurer.
2. Receives information from dean of faculty regarding the degree of assistance required from the classroom angel and the equipment needed.
3. Receive list of those who volunteer to be an angel from the registrar.
4. Carefully selects a classroom angel for each class from class lists provided by registrar. Angels should be selected for any mini-classes offered by the seminar.  
*Note: It is strongly suggested that first timers not be considered for this job. Attendees with mobility issues may have problems performing some of the duties of the angel.*
5. Send an email or letter to each class angel that includes responsibilities, who they will be working with, contact info for teachers as required.
6. Supplies each classroom angel with a list of duties.
7. Checks with each classroom angel to ensure angel has contacted teacher.
8. Arranges a meeting of classroom angels before seminar's opening, to acquaint them with the site, classroom area (including mobility impaired information), and teachers. This meeting may be held virtually.
9. Provides classroom angels with pins and/or other identifying item so their class members know who they are.
10. Obtains class lists prior to the first day of class and distributes lists to appropriate classroom angels.
11. Gives each classroom angel the time table for daily activities related to the specific classes.
12. Is available for questions and assistance during seminar.
13. Checks with dean of faculty and/or facilities chairman regarding any unusual aspects of classroom facilities.
14. Coordinates with facilities chairman for classroom needs for:
  - a. Audio-visual equipment needs for classes and maintains a master list.
  - b. **Ascertains if classrooms will lock at lunch and/or overnight and if students may leave supplies in the room.**

15. Prepare final report to be sent to seminar chair within 60 days of close of seminar.

## **CLASSROOM ANGEL DUTIES**

1. Serves as the liaison between the teachers, students, and the seminar committee. Contacts teacher before seminar to help ensure that class runs smoothly.
2. Determines classroom location, nearest restroom facilities, and emergency exits locations as well as the location of elevators and areas for breaks.
3. Checks for white board/flipchart, markers, erasers, and other equipment requested by teacher.
4. Determines if teacher needs assistance getting items from sleeping room to the classroom. (Classroom angels are not required to handle heavy items.)
5. Arrives at class as early as requested by teacher to be available to assist the teacher in arranging the room or distributing kits.
6. Sits in a location that will enable easy assistance during class, as necessary.
7. Takes attendance and notifies the seminar chair of unaccountable absence, to ensure that a student is not ill or in trouble.
8. Enforces the No Smoking, No Beverages, and No Selling rules in the classroom.
9. Sets the example during class - no excessive talking.
10. Reminds students that use of perfume or other scented materials may cause allergic reactions in some students or teacher.
11. Watches the time and announces the breaks. Encourages students not to linger so that the teacher may take full advantage of the break time.
12. Clears and locks the room before lunch and returns early, before classroom is scheduled to be opened. Discusses this with teacher and class in case class needs to return early to work.
13. Keeps an eye on the sample piece and any items the teacher brings to share so they will be returned.
14. Ensures class is not disturbed by visitors.
15. Checks classroom at end of day, assisting teacher as needed.
16. Sees that teacher signs class completion certificates; returns any "no shows" to seminar chair. (Each seminar may determine if certificates will be issued.)
17. Contacts seminar committee with any problem or question.

## SAMPLE CLASSROOM ANGEL “LETTER”

*Dear Classroom Angel,*

*We are happy that you are attending Seminar \_\_\_\_\_ and are volunteering to be a classroom angel for your class. I also want to take this opportunity to welcome you to the seminar and know you will find the whole seminar experience a happy one.*

*Thank you for contributing to seminar \_\_\_\_\_ by agreeing to be a classroom angel for <name of class> \_\_\_\_\_ class to be taught by <Teacher> \_\_\_\_\_ on \_\_\_\_\_ (days).*

*A very important meeting of all Seminar \_\_\_\_\_ Angels will be held on \_\_\_\_\_ at \_\_\_\_\_ (AM or PM) in the \_\_\_\_\_ room of the \_\_\_\_\_ hotel or Virtually <insert link>. At this meeting the Angel duties for this seminar will be reviewed.*

*Thank you again for agreeing to contribute to Seminar \_\_\_\_\_ by accepting the role of CLASSROOM ANGEL. It is through volunteers like yourself that EGA can offer superb needlework educational events, such as this seminar.*

*I look forward to greeting you and your fellow Angels at this meeting.*

*Sincerely,*

*<Name>*

*Seminar \_\_\_\_\_ Classroom Angels' Chair*

## EXHIBITS

1. An exhibit at a seminar is optional. If an exhibit at a seminar is juried, the region will pay the judges fees up to an amount determined by the region board.
2. Prior to planning an exhibit, a packet of insurance forms must be downloaded from the EGA national website to provide complete coverage to exhibitors.
3. Works within budget, making timely reports to the seminar chair, seminar treasurer and the region director.
4. Set up specific criteria for entries and notify all chapters or members. Set deadline for entries.
5. If there is to be a theme exhibit, the theme should be clearly explained in the seminar brochure/website: i.e., theme, size, due date.
6. Arrange for judges and a time for judging if the exhibit is to be judged.
7. Works with the facility coordinator to arrange for exhibit space, necessary flats, and tables at the seminar facility.
8. Arranges for receiving, registering, hanging, dismantling, viewing hours, security, shipping, and awards for all exhibits planned during the seminar.
9. Files EGA exhibit insurance forms with EGA Headquarters (see [www.egausa.org](http://www.egausa.org) – Forms & Guides)
10. Prepares necessary layout diagrams prior to hanging the exhibit.
11. Supervises exhibit committee during the preparation and return of pieces. Views the contents of each exhibit box for damage.
12. Sees that identification cards are properly prepared for each exhibit item.
13. Requests hostesses from Volunteer Coordinator to work during exhibit hours.
14. Makes sure exhibit pieces are secure during non-exhibit hours.
15. Prepares final report to be sent to seminar chair within 60 days of closing of seminar.
16. HELPFUL SUPPLIES TO HAVE ON HAND
  - a. Prior to seminar: File cards or notebook to record information on each exhibit; colored, self-adhesive labels – one color per category; identification cards

- b. Hanging the Exhibit: Extra identification cards, plastic fishing line (preferably 20 lb. test); extra mounting hooks or pins; double-sided transparent tape; straight pins, T-pins, safety pins; padded hangers; scissors, utility knife, felt tip pens, hammer, stapler, screwdriver, glue sticks.
- c. Returning the Exhibit: Extra shipping labels; rolls of shipping tape
- d. It is highly recommended any exhibit entries be returned with an adult signature required.

## **FACULTY TRANSPORTATION & AIRPORT COORDINATOR**

1. Check with the hotel as to the service it is willing to provide to participants and specify those services in the hotel contract.
2. Arrange parking facilities for those who drive to seminar and transportation to and from parking, if needed.
3. If the hotel cannot provide adequate transportation service, check on commercial limousine and taxi services.
4. Check on available special transportation services that should be arranged for peak hours.
5. Give all transportation information to the brochure chair for inclusion on the website so that each participant is made aware of the options open to her/him and may make plans accordingly.
6. Be sure special rates agreed on or other arrangements are made for those guests that arrive prior to or stay after the actual seminar.
7. Prepares final report to be sent to seminar chair within 60 days of closing of seminar
8. Arrange for volunteers to pick up National Board Members, region director and Teachers if no complimentary transportation service is available.

## **FOOD CHAIR**

If a paid hotel facilitator is used, the food chair will work with the facilitator.

1. Works within budget, making timely reports to seminar chair and seminar treasurer.
2. Selects menus that have an appeal to the majority. Consults the hotel food services manager for suggestions.
3. Selects several menus to present to the seminar committee for final decision.
4. To eliminate duplication of menu's, coordinates menus with the special events chair if meals are planned during tours or as part of a special evening event.
5. Works with the seminar chair and the registrar to provide color-coded meal tickets for registration packets. Provides tickets for special food needs. Suggestion: Specify the special needs on the ticket; such as seafood allergy, lactose free, vegan, etc.
6. Ensures tickets are printed for each function (optional). Oversees the collection of meal tickets, if used, and compares these figures with those provided by the hotel.
7. Works with the seminar chair in planning meal program formats, i.e., contacting speakers, requesting audio-visual equipment, asking someone to present a non-sectarian invocation, coordinating introductory speeches.
8. Coordinates with Hospitality chair for decorations and favors at meals.
9. Meets with the hotel staff to determine how much can be placed on each table and when the committee will be allowed in the room to decorate.
10. Arrange for special sandwich or salad bars and/or continental breakfast bars, if needed.
11. Plans for any pre-function reception, including the setup of a cash bar.
12. Prepares final report to be sent to seminar chair within 60 days of closing of seminar.



## MERCHANDISE EVENT

1. **The Merchandise Event is optional, and if held, must be open to all EGA members whether or not they are registered at the seminar.**
2. **A committee appointed by the seminar chairman will determine the eligibility of items for sale at the Merchandise Event. All items must be embroidery-related or approved by the seminar committee.**
3. Merchants do not have to be EGA members.
4. The seminar committee will approve all items for sale prior to the Merchandise Event.
5. Chapters wishing to sell non-embroidery related items as a host unit fund raiser may do so only at the Merchandise Event with prior approval of the SCR seminar committee. Such approval must be requested in writing in advance of the seminar.
6. **No teacher or seminar participant will sell items from her room or in a classroom.**

## JOB DESCRIPTION

1. Organize a time period for selling needlework-related items.
2. Works with seminar treasurer to determine the applicability of the local sales tax laws. Ensures sales tax information is distributed to all Merchandise Event vendors prior to the event, in a clear and concise manner. See
3. Prepare information to be put in the brochure and notebook.
4. Send a letter to vendors enclosing a request for information on the items offered for sale. Sales tax information should be included in the letter. *Note: The letter may be sent electronically.* See SECTION IV – FORMS, CONTRACTS, LETTERS and WORKSHEETS for a sample email.
5. Obtain a signed MERCHANDISE EVENT INSURANCE INFORMATION FORM FOR NON-EGA MEMBERS from any non-EGA member vendors. The form may be found in SECTION IV – FORMS, CONTRACTS, LETTERS and WORKSHEETS.
6. Prepare a room layout and submit it to the facilities coordinator for setup by hotel staff. Arrange for a water table set-up.
7. Assign tables, attempting to separate vendors selling the same or similar items.

8. Prepare an alphabetical list of vendors and synopsis of items they are selling to be put in the seminar notebook.
9. Make table number cards, name cards for tables, and cards to be placed in the registration envelopes of the vendors, giving them their table assignments.
10. Oversee the table set-up by the facility employees. Place the table numbers and name cards on tables.
11. Supervise the vendors' set-up, assisting as needed with questions.
12. Assist during the event and at breakdown.
13. Prepare a final report to be sent to the seminar chair within 60 days of close of the seminar.

#### **Other Considerations**

1. Tables and half tables may be rented; however, each seminar may choose to offer whole tables only.
2. Rental fees: check with the previous seminar committee to see what was charged per full and half table. SCR and EGA HQ will not be charged a rental fee.
3. Sales tax laws from the state where the seminar is held must be followed.

## NAME TAGS

1. Name tags may be planned by the seminar committee or each registrant may be asked to bring their own. When name tags are planned, a chairman should be appointed.
2. Design name tags using the seminar theme for the following participants:
  - a. Students
  - b. Teachers
  - c. Seminar committee members
  - d. National/region officers
3. Purchase materials, “kit” name tags and distribute to stitchers.
4. Name tag kits may be sold before the seminar for additional host unit revenue.
5. Coordinate with registrar to obtain names and quantity needed.
6. Send name tags to the registrar to be placed in each registration envelope.
7. Arrange to be at the registration table to correct spelling or make name tags for late registrants.
8. Make a name tag for the national president, if attending the seminar.
9. Optional: Provide “tags” (i.e., ribbons order from EGA HQ) for attendees and for any other VIP the seminar committee directs. See Section III. H. Registrar – Job Descriptions for a current list of available ribbons.
10. Prepare a final report to be sent to the seminar chair within 60 days of close of the seminar.

## NOTEBOOK

1. The seminar notebook is distributed to all the seminar participants at the seminar.
2. Works within budget, making timely reports to seminar chair and seminar treasurer.
3. Obtains price quotes from three printing sources based on previous notebook size and style.
4. Collects information from registrar and appropriate chairmen to be included in seminar notebook.
5. It is recommended that the seminar notebook contain:
  - a. Front cover with logo, date, theme, and place prominently displayed.
  - b. Schedule listing all activities and events.
  - c. Welcome letters from region director and seminar chair.
  - d. List of special activities, and general information regarding hotel, bookstore, boutique, exhibit, etc.
  - e. List of faculty members, addresses and phone numbers.
  - f. List of registrants, addresses, phone numbers and class assignments. (Note: Registrants may opt out of listing their personal information.)
  - g. List of restaurants.
  - h. List of historical facts about the area where the seminar is located.
6. Arranges for printing and binding of the notebook.
7. Obtains local advertising, if desired.
8. Prepares and edits final copy to be approved by seminar chair and region director. Note: The mock-up shall be proofread by two people other than seminar notebook chair, and then approved by seminar chair.
9. Coordinates notebook distribution with registrar.
10. Prepares final report to be sent to seminar chair within 60 days of closing of seminar.

## OPPORTUNITY KNOCKS

1. Opportunity Knocks is an optional activity where chapters can bring stitching related items (herein called baskets) to the seminar – for a better term, it is a raffle. Tickets are sold to seminar participants. Tickets are put in containers by each chapter's basket. Chapters receive the revenue from their container after the seminar is over.
2. Email a registration form/letter to each chapter president and region representative approximately five (5) months before the seminar to find out which chapters are going to participate. An announcement should be made at the region mid-year meeting. Chapters must indicate the space they will need, along with other special needs, such as electricity, and a chapter contact name and mailing address for their check.
3. Baskets that are not pre-registered may be accepted for inclusion at the discretion of the opportunity knocks chair if sufficient space is available.
4. Provide brochure chair opportunity knocks contact information (scr20xxopknocks@gmail.com) for inclusion in the seminar brochure.
5. Allocate table space for each chapter's items(s) and a ticket container. Coordinate with the facilities coordinator for room space and required tables. Prepare a diagram so volunteers will know where to place the baskets. Plan for at least two extra spaces for baskets for those chapters who decide to participate at the last minute.
6. Allocate sufficient space for the Group Correspondence Course (GCC) registration drop off box; including applicable forms, advertising materials and pens.
7. Purchase rolls of single tickets. Participants write their name and phone number on each ticket. The chair should consult with prior Opportunity Knocks chairs to determine the number of tickets to purchase. In 2014, approximately 4,500 tickets were sold.
8. Prepare containers for the tickets. Containers should have the basket number and optionally, the chapter's name on it.
9. Coordinate with the hospitality chair for volunteers to help sell tickets, help with the drawings and to write down the basket number and the winner's name.
10. Coordinate with the seminar treasurer to collect the money from ticket sales.
11. Distribute the baskets to the winners.
12. Take pictures of each winner with their basket.

13. Prepare an index card with the chapter's contact information for each basket to give to each winner so they may send a thank you note to the chapter if they wish.
14. Count the tickets in each container and give the chapter name and number of tickets to the seminar treasurer.
15. Prepare a final report to be sent to the seminar chair within 60 days of the close of the seminar.

## SAMPLE OPPORTUNITY KNOCKS NOTICE

<LOGO>

### Opportunity Knocks Baskets

Welcome to the South-Central Region's "20xx ~ <Theme>" seminar brought to you by the <Chapter>!

"Opportunity Knocks" baskets provide YOUR chapter the opportunity to raise money by assembling a unique basket to be given to a lucky winner at the seminar. The more pleasing and eye-catching your basket, the better chances your chapter has to raise money.

Tickets sold are \$1 each and your chapter will receive 100% of the value of the tickets deposited in the ticket receptacles for your chapter's basket. Provide a picture of the items in your basket to encourage people to choose your basket!

Baskets can be dropped off at the registration desk *until 5.30 pm on Wednesday, <Date>*.

The drawing for the baskets will be held at the Friday night banquet on <Date>. Winners need not be present; however, if not present someone must pick up the winning basket for them.

To reserve a space for your basket, please fill out the information below and submit your request

via email (preferred) to scr20xxopknocks@gmail.com

or by mail to Opportunity Knocks  
c/o Address



Please print clearly and legibly

Name of your chapter \_\_\_\_\_

Information of person bringing the basket to the seminar

Name \_\_\_\_\_

Email \_\_\_\_\_

Cell Phone \_\_\_\_\_

Please make sure we can reach you at this number during the seminar

Value of the basket \_\_\_\_\_

Please keep it under the IRS limit of \$600

Mail revenue check to

Name \_\_\_\_\_

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

## REGION DAY

Region Day activities are funded by the region even though the fees are collected by the seminar registrar. The seminar committee plans for and provides space for Region Day activities.

1. Contact the region treasurer for the amount of funds allocated by SCR for Region Day activities
2. The Seminar should submit a reimbursement request for the cost of Region Day up to the maximum allowed by the current budget. As of 2/2020, the maximum amount is \$2,000. Any Region Day shortages or overages will be split between the host unit and the region per the current host unit/Region split.
3. **A volunteer member leading a bus tour at the SCR seminar need not pay for her tour ticket.**
4. Arrange for tours and special events planned in conjunction with the seminar.
5. Submit tour descriptions, time tables, and costs for publication in the brochure. Registration for tours should be included on the registration form.
6. Maintain a list of participants for each tour.
7. Prepare tickets to be placed in the registration envelopes.
8. Coordinate with the hospitality chairman to arrange for hostesses for each event.
9. Tours may be run by the seminar committee or arranged through a tour agency.
10. On tour days, be on hand to monitor tour departures, making sure hostesses and tour guides are in place.
11. Include a cancellation clause in any tour agency contract for any under subscribed tours.
12. Prepare a final report to be sent to the seminar chair within 60 days of the close of the seminar.



## **TEACHER'S SHOWCASE**

1. Receive a list of teachers who will be participating in “teacher’s showcase” from the dean of faculty.
2. Prepare information to be placed on the website and in seminar notebook.
3. If the dean of faculty requests, send a letter to the teachers outlining when and where the showcase will be held.
4. Prepare table number cards, name cards, and assignment cards to be placed in each teacher’s registration packet.
5. Coordinate with the facilities coordinator for space at the seminar. Prepare a room layout and assign table.
6. Oversee the room set-up by the facility staff.
7. Assist the participants in setting up the tables prior to the event.
8. Supervise and assist during the event and in the clean-up.
9. Prepare a final report to be sent to the seminar chair within 60 days of the close of seminar.

## **SEMINAR WEBMASTER**

1. As of June, 2015, the region board hired a seminar webmaster in order to have an experienced webmaster prepare a consistent website year after year for seminar brochures. The webmaster fee will be paid by Region and does not need to be in the Seminar budget.
2. The webmaster will be responsible for creating and maintaining the seminar website. It will be a subpage on the Region website.
3. Upon request, the webmaster will work with each committee chair to create all necessary seminar email addresses. See Appendix B – Seminar Email Addresses for additional information.
4. The seminar brochure will be published on a website rather than printing and mailing a brochure. Each participant will be responsible for printing their own brochure.
5. The seminar webmaster will report to the region's executive board, but is not a member of the board.
6. The webmaster will receive seminar information from the host seminar brochure chairman for publication on a web page.
7. Note: The seminar webmaster does not create or edit brochure content. It is the responsibility of the brochure chair to ensure the accuracy of the brochure content and style consistency; including font style, size, and text color.

## SECTION IV – FORMS, CONTRACTS, LETTERS and WORKSHEETS

### ***SOUTH CENTRAL REGION EGA SEMINAR RESUME***

PLEASE PRINT OR TYPE: (May attach personal resume if available.)

NAME \_\_\_\_\_ DATE \_\_\_\_\_

ADDRESS \_\_\_\_\_

CHAPTER \_\_\_\_\_ REGION \_\_\_\_\_

MEMBERSHIP NUMBER \_\_\_\_\_ MEMBER SINCE \_\_\_\_\_

HOME PHONE \_\_\_\_\_ BUSINESS PHONE \_\_\_\_\_ CELL PHONE \_\_\_\_\_

E-MAIL ADDRESS \_\_\_\_\_

Does your e-mail allow you to receive attachments? \_\_\_\_ Yes \_\_\_\_ No

EDUCATION:

WORK EXPERIENCE:

VOLUNTEER/CLUB EXPERIENCE (other than EGA for the past 5 years):

EGA EXPERIENCE:

Chapter positions and offices held:

Region positions and offices held:

National EGA Positions: Elected offices and committee chairs held:

SKILLS/EXPERIENCE RELATED TO THE SEMINAR POSITION:

Please return to:

SCR Region Director  
scr.regiondirector@gmail.com

## ***CALENDAR OF EVENTS FORM***

The seminar chair shall work with the region director to list the seminar dates and location on the National EGA Calendar. This may be done via email with the National office. (See EGAUSA.org for contact information.)

CHAPTER/REGION \_\_\_\_\_

MEETING DATES \_\_\_\_\_ TIME: \_\_\_\_\_

LOCATION ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_

STATE \_\_\_\_\_

CONTACT \_\_\_\_\_

TELEPHONE (\_\_\_\_\_) \_\_\_\_\_

SEMINAR/EXHIBIT DATES \_\_\_\_\_

SEMINAR/EXHIBIT LOCATION \_\_\_\_\_

CITY \_\_\_\_\_

STATE \_\_\_\_\_

CONTACT:

TELEPHONE (\_\_\_\_\_) \_\_\_\_\_

SUBMITTED BY \_\_\_\_\_

TITLE \_\_\_\_\_ DATE \_\_\_\_\_

Please return to:

The Embroiderers' Guild of America  
1205 East Washington St., Suite 117  
Louisville, KY 40206

## ***LETTER OF AGREEMENT FOR FINANCIAL RESPONSIBILITY OF SPECIAL EVENTS***

Each committee for a chapter/region sponsored event determines its own financial budget. Financial budgets shall be submitted on a regularly scheduled timeline to the region director and the region treasurer for review and presentation to the board of directors for approval.

IF THE APPROVED BUDGET POLICIES AND PROCEDURES ARE FOLLOWED AND A DEFICIT OCCURS, South Central Region SHALL BEAR THE RESPONSIBILITY. IF A DEFICIT OCCURS BECAUSE THE POLICIES AND PROCEDURES WERE NOT FOLLOWED, THE RESPONSIBILITY LIES WITH THE Host Unit. (\_\_\_\_\_) fill in the name.

Seminars - The budgeting process is an important planning tool of the seminar committee. However, the board of directors has the responsibility of approving finances. The seminar committee collects and organizes financial information to assist in planning.

Please read carefully the policies and procedures of region. Ask any questions where you feel clarification necessary in order that you completely understand what is required of you. Then sign, date, and return the original form to the region director.

I have read and understand the South Central Region Policies and Procedures and Seminar Guidelines that outline the duties and responsibilities of my office, and shall adhere to the policies set forth.

\_\_\_\_\_  
Chair, Seminar

Date: \_\_\_\_\_

\_\_\_\_\_  
Region Director, SCR

Date: \_\_\_\_\_

\_\_\_\_\_  
Treasurer, SCR

Date: \_\_\_\_\_

## ***MERCHANDISE EVENT SOLICITATION EMAIL***

<LOGO>

The South Central Region Embroiderers' Guild's (SCR EGA) region seminar will be held in <city, state, location> this year. Merchandise Night/Day/Event is scheduled on <day of week>, <date> with shopping from <begin time> - <end time>.

Tables for vendors will be limited, so it will be on a first come, first served basis. Full tables with no power cost \$<amount>, full tables with power are \$<amount>. Half tables are \$<amount>.

All merchandise items must be embroidery related.

If you would like more information or would if you would like to participate in our Merchandise Night/Day/Event, please contact me at scr20xxmerchandise@gmail.com.

Thank you!

<signature>

Name

Chair, Merchandise Night/Day/Event

SCR Seminar 20xx

## ***TEXAS SALES TAX INFORMATION***

Since many of the SCR Seminars are held in Texas, here is the information sheet for San Antonio, TX. Each seminar should determine their local sales tax percentage.

### **SEMINAR MERCHANDISE EVENT VENDOR INFORMATION – TEXAS**

#### **SAN ANTONIO, TEXAS - SALES TAX RATE IS 8.25%**

#### **Who is required to hold a Texas sales and use tax permit?**

You must obtain a Texas sales and use tax permit if you are engaged in business in Texas and you:

- sell tangible personal property in Texas;
- lease tangible personal property in Texas; or
- sell taxable services in Texas.

#### **What is tangible personal property?**

The statutory definition for "tangible personal property" is "personal property that can be seen, weighed, measured, felt, or touched or that is perceptible to the senses."

#### **What is engaged in business?**

A person or a retailer is engaged in business in Texas if any of the following criteria are met:

- (A) maintains, occupies, or uses an office, place of distribution, sales or sample room, warehouse or storage place, or other place of business;
- (B) has any representative, agent, salesperson, canvasser, or solicitor who operates in this state under the authority of the seller to sell, deliver, or take orders for any taxable items;
- (C) promotes a flea market, trade day, or other event that involves sales of taxable items;
- (D) uses independent salespersons in direct sales of taxable items;
- (E) derives receipts from a rental or lease of tangible personal property that is located in this state;
- (F) allows a franchisee or licensee to operate under its trade name if the franchisee or licensee is required to collect Texas sales or use tax; or
- (G) conducts business in this state through employees, agents, or independent contractors.

### **How do I get a permit?**

You can apply for a sales tax permit using our [Texas Online Sales Tax Registration Application System](#), or print an application from the [Texas Sales and Use Tax Forms](#) Web page (<http://comptroller.texas.gov>) and mail it to the Comptroller. You can also call 1-800-252-5555 or visit a Comptroller [field office](#). Applications and information on what is needed to apply for a Texas sales tax permit are available on our website at [www.window.state.tx.us/taxpermit](http://www.window.state.tx.us/taxpermit). There is no fee for a permit.

### **Sales Tax Forms**

Forms and Web Filing are available at <http://comptroller.texas.gov>.

## ***MERCHANDISE EVENT INSURANCE INFORMATION FORM FOR NON-EGA MEMBERS***

This form should be provided to all merchandise event vendors who are not EGA members. The vendor should return the signed form to the merchandise event chair prior to seminar.

Return via mail or email to address below prior to seminar

By signature below, I acknowledge that I have been informed that EGA does not provide any insurance coverage for non-EGA members. If you choose to scan and email this form, you agree that a scanned signature on this document is authorized and may substitute for an original signature wherever a signature is required.

---

Business or Organization Name

---

Printed name

---

Signature

---

Date

Return Completed form to: \_\_\_\_\_  
Name, Chairman, Merchandise Event

\_\_\_\_\_  
Street Address, City, State, ZIP

\_\_\_\_\_  
Phone

\_\_\_\_\_  
scr20xxmerchandise@gmail.com

Email



## ***REQUEST FOR REIMBURSEMENT FROM SCR SEMINAR 20XX***

SCR EGA Seminar

\_\_\_\_\_  
Date

Amount

Requested by:

Committee:

Please Pay to:

\_\_\_\_\_  
(Address)

\_\_\_\_\_  
(City, State, Zip)

\_\_\_\_\_  
(Telephone)

Brief explanation with receipts attached: (list telephone, postage, printing, etc.)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Scan and email to [scr20xxtreasurer@gmail.com](mailto:scr20xxtreasurer@gmail.com) or mail to

<Name>, <Address>, <City, State, Zip>

### **For Treasurer's Use**

Approved By:

Paid Check #

Date: \_\_\_\_\_

Accounts or Categories: \_\_\_\_\_

## ***SPECIAL EVENTS***

### **BOOKSTORE CONTRACT**

This Agreement is made and entered into between the South Central Region of The Embroiderers' Guild of America, Inc Seminar (hereinafter referred to as region seminar) and <insert name required>.

1. Provide everything necessary to conduct business, including cash on hand and credit card services, except what is provided by \_\_\_\_\_.
2. Be responsible for business risks of "bad" checks, with insufficient funds, or declined credit card purchases and collection of same.
3. Transport merchandise, supplies, and personnel to and from <insert name of city and state>.
4. Be responsible for all expenses incurred in operating the bookstore such as the cost of merchandise, salaries, bank charges, freight, sales tax, (where applicable, business licensing and registration fees, re-stocking fees, equipment rental, insurance on the inventory and personal expense for food and lodging.)
5. Make arrangements with hotel for lodging, telephone connection and deposits and charges, if any.
6. Take special orders and rain checks for future delivery to customers who shop during seminar.
7. Pay for all transportation, lodging, and meals for paid (non-volunteer) personnel staffing the bookstore.
8. Pay region <xx> percent of net sales made during region seminar \_\_\_\_, including special orders and rain checks. Full payment will be made within seven (7) days of the close of seminar. Payment will be accompanied by a list of books sold and the prices charged for each.
9. Provide camera-ready advertising materials if region seminar \_\_\_\_\_ makes advertising space available in seminar materials.
10. Provide to the bookstore coordinator, at least 2 weeks prior to seminar, a list of books which are planned to be sold in the store. This list is for informational purposes only and will in no way limit the ability of (insert name of shop) to add or delete stock as required for the actual seminar bookstore.

SCR Region Seminar \_\_\_\_\_ agrees to:

1. Provide a suitable room at the hotel for the bookstore. The room will at a minimum have properly secured doors which can be locked when the store is closed; adequate tables to display merchandise, with drapes if possible: tables to conduct business; chairs, and a telephone outlet.

2. Provide sufficient volunteer assistance (at least 2 people) to help unpack merchandise and supplies, set up the shop, maintain security when the shop is open, assist with sales in the shop, and dismantle the shop at the end of seminar.
3. Provide a list of faculty, with addresses, telephone numbers (if available) and the class each will teach.
4. Arrange seminar rate for one hotel room in the seminar hotel.
5. Provide point of contact at hotel for arrangements.
6. Provide all published seminar materials, before and during seminar.
7. Provide free advertising in seminar materials, if advertising is sold or made available to other businesses. Publicity of bookstore location and hours during seminar.
8. Acknowledge (insert name of shop) at closing banquet, if there is one.
9. Provide \_\_\_\_ lunch tickets per day. (Optional)

\_\_\_\_\_  
Owner and Shop name

\_\_\_\_\_  
Region Director

Date: \_\_\_\_\_

Date: \_\_\_\_\_

## BOUTIQUE CONTRACT

This agreement is made and entered into between the SCR Region of The Embroiderers' Guild of America, Inc. Seminar (year) (hereinafter referred to as SCR Seminar (year) and (insert name of owner and name of shop) hereinafter referred to as (insert name of shop).

In consideration of the mutual agreements set forth, the parties hereto agree as follows:

1. Name of shop will provide merchandise to set up and stock a retail shop in the <insert name of site, city, and state>.
2. Name of shop will pay all expenses incurred when carrying out Item #1.
3. The dates and hours that the shop occupy provided space are as follows:
  - Day of week, date (month, day, and year) hours
  - Dictate set up hours
  - Open for business hours and dismantling hours.
4. (Insert name of shop) will provide region seminar \_\_\_\_, or their agent, daily totals of the sale of boutique merchandise.
5. (Insert name of shop) is responsible for all expenses incurred in operating the Bookstore such as the cost of merchandise, salaries, bank charges, freight, sales tax, (where applicable, business licensing and registration fees, re-stocking fees, equipment rental, insurance on the inventory and personal expense for food and lodging).
6. Within seven (7) days from the close of region seminar \_\_\_\_ (insert name of shop) will pay to region seminar \_\_\_\_ or their agent, (\_\_\_\_ %) percent of the net gross. Net gross is defined as the total of all retail sales of merchandise after deducting the state and local sales tax.
7. Region seminar \_\_\_\_ assumes no liability and (insert name of shop) agrees to indemnify, protect, hold harmless and reimburse region seminar \_\_\_\_ in connection with all liability, loss, cost, damage, or expense that may be incurred by region seminar \_\_\_\_ for reason of any of the following:
  - a. Failure of (insert name of shop) to pay debts incurred in connection with the purchase of materials and/or the hiring of any person to carry out the responsibilities as outlined in items 2 through 5.
    - i. Injury or alleged injury of any kind to any person resulting in any way from the execution of items 1 through 5.

ii. Loss of any materials brought into (inset name of site) by (insert name of shop) due to fire, theft, or damage of any kind.

8. Region seminar will provide the personnel for the set-up, breakdown, and staffing of the shop during the agreed upon hours. <Optional>

9. Region seminar \_\_\_\_\_ will provide a room for the shop in (inset name of site, city, and state).

10. Region seminar \_\_\_\_\_ will provide volunteers to provide a bag checking service at the entrance of the shop.

11. Region seminar \_\_\_\_\_ will provide \_\_\_\_ lunch tickets per day. (Optional)

This instrument contains the entire agreement of the parties.

IN WITNESS THEREOF, the parties hereto have executed this Agreement:

THE EMBROIDERERS' GUILD OF AMERICA, INC., SCR REGION SEMINAR \_\_\_\_\_

By: \_\_\_\_\_  
Name of shop owner

By: \_\_\_\_\_  
Region Director

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

## ***FACILITIES***

Searching for a hotel for seminar can seem like a daunting task. However, like anything, break it down into steps and accomplish one at a time.

In a simplified form, the steps are: decide on a preliminary agenda, look for hotels that will accommodate that agenda; send a request for proposal (RFP) to each of those hotels, review the proposals, select the one that suits your needs, visit the hotel, and negotiate a contract.

A preliminary seminar agenda should be in place before contacting any hotels, as this will determine the event space requirements, taking into account any time for set-up. For example, a boutique will require one day to set up before they open and perhaps one day to tear down after closing. Knowing your needs will assist in finding the right hotel.

A Request for Proposal (RFP) should be sent to each hotel from which the group has determined may suit the needs of the seminar. Some hotels will not be interested in sending a proposal as this group takes more event space than it books guest rooms to support the event space. Guest room bookings are how a hotel makes most of its money. If you are asking for 90% of the hotel's event space and only 20% of the guest rooms, it may not be profitable for the hotel to bid on the business. Do not be discouraged! Also, do not feel you have to limit your search to local venues. With e-mail and internet access, it is not difficult to perform the require duties of putting on a seminar from anywhere.

A Group Profile is not necessary but will be helpful and should be sent with the RFP. Include such information as, demographics of the group; where the attendees will travel from, will they travel by air or land; mobility issues; the fact that they "pack heavy", etc.

### **FACILITY SITE BASIC REQUIREMENTS**

- Date of event
- Suitable location – easily accessible by car and other transportation
- A room for region board meeting at no or minimal cost
- Space for meetings in conjunction with the seminar
- Well lit, sound proof classroom space at no or minimal cost
- Boutique and/or bookstore room
- Region exhibit space (Optional)
- Number of participants expected to attend
- Adequate number of sleeping rooms – need more double beds than king size
- Availability of food service on and off facility
- Adequate dining facilities for banquet and all other meals. Traditionally, lunch is served on class days and a banquet is held the evening before the last day of class.
- Handicap accessible

- Proximity to major highways and airports
- Availability of ground transportation
- A suite or room suitable for holding meetings should be provided the region director during the entire seminar
- Registration and information area

#### OTHER NECESSARY INFORMATION

- Make sure all agreements are in writing as hotel personnel often change from year to year. Be prepared to produce written proof of any agreements made.
- Convey specific needs to hotel
- General schedule of meetings, banquets, etc. should be brought to all meetings with site staff
- Classroom list:
  - Specific requirements per class
  - Lighting
  - Class set up

Arrange for facilities coordinator to deal with daily needs and advise hotel of this contact person who can make schedule changes and decisions.

If free rooms are available, these complimentary rooms may be allocated per the wishes of the seminar executive committee. It is common practice to allocate a room to the seminar chair and to the region director. Remaining rooms may be allocated to seminar committee members, Chapter members, region Board members and/or faculty.

#### HOTEL SEARCH WORKSHEET

NAME OF HOTEL

Person Contacted

TITLE

E-MAIL ADDRESS

TELEPHONE #

FAX #

AVAILABLE DATES

What other and how many groups are scheduled in the hotel the same time?

Size of groups?



## GUESTROOMS

**Note – this seminar usually requires a higher number of rooms with 2 beds, as many attendees share rooms**

Seminar needs are:

List number of the following types of rooms required

Double/Double Suites:

Twin/King:

Other:

What are the lowest guest room rates for:

Single Occupancy

Double

Triple

Quad

Suites? One-bedroom

Two-bedroom

Hospitality

Are lower rates available during other dates?

Meeting Room Requirement:

NOTE – when looking at floor plans and capacity charts that the hotel may have, reduce the number by at least 30% to get a more realistic figure. Reduce it by more, if there will be head tables, materials tables, or work tables in addition to the classroom tables.

Classrooms: 10 to 15 classrooms large enough to accommodate up to 20 students each

Classroom needs: Tables 6'x30" or 8'x30" if possible, chairs, individual temperature control and good lighting.

Accommodations for Handicap? \_\_\_\_\_ Scooter parking? \_\_\_\_\_

Are there charges for room set-up? \_\_\_\_\_

Is there an audio/visual service company in the hotel? \_\_\_\_\_

May the group bring in their own A/V equipment? \_\_\_\_\_ Cost or  
Comp? \_\_\_\_\_

Limitations? \_\_\_\_\_

If number of classrooms is inadequate, does the hotel have parlor suites available that can be used as classrooms? \_\_\_\_\_

Can adjacent bedrooms be used for teacher accommodations? \_\_\_\_\_

Is there a charge for removing furniture? \_\_\_\_\_

One-time Events:

Teacher's Showcase:

Region Executive Committee Meeting:

Region Meeting:

Merchandise Event:

Any other evening events:

Boutique/Bookstore Needs:

1,000 to 2,000 sq. ft., 24 hour set up with Security from set-up time to close of bookstore/boutique.

Set-up is one day in advance. Teardown may require a day.

Exhibit Needs:

Will there be any need for displays? \_\_\_\_\_

Seminar pieces for next year? \_\_\_\_\_

Opportunity Knocks? \_\_\_\_\_

Juried Exhibit? \_\_\_\_\_

Is pipe and drape required? \_\_\_\_\_

Cost? \_\_\_\_\_

Or just tables? \_\_\_\_\_

Security?

One-time Events:

Teacher's Showcase:

Region Executive Committee Meeting:

Region Meeting:

Merchandise Event:

Any other evening events:

Hospitality Suite/Room with bathroom. (Some form of room is needed for seminar business.)

Is one available? \_\_\_\_\_ Cost or Comp?  
\_\_\_\_\_

Registration Area

Does the hotel have a dedicated area or built-in registration facility?

Meal Requirements:

Number of scheduled meals for the group:

Region Meeting Meals: \_\_\_\_\_ For how many? \_\_\_\_\_

Region Day Meals: \_\_\_\_\_ For how many? \_\_\_\_\_

Lunches: \_\_\_\_\_ For how many? \_\_\_\_\_

Dinners: \_\_\_\_\_ For how many? \_\_\_\_\_

Is the group tax exempt, with the proper paperwork? \_\_\_\_\_

What is the service charge for meal service? \_\_\_\_\_

Other meal requirements:

The group will have all other meals on own.

Can dining facilities in the hotel accommodate the group in a timely manner? \_\_\_\_\_

Is there a "Grab and Go" Breakfast Bar? \_\_\_\_\_

Questions: Does the hotel have union workers? If so, when will their contract expire?

Problems with Unions (if applicable)?

May vendors load and unload on their own?

Where is location of loading dock?

Can merchandise be shipped to hotel prior to arrival? Where is Receiving and Storage?

Policy on movement of boxes within hotel? (Union)

Deposit/credit requirements?

Negotiating the Contract

Once negotiations begin, these are examples of concessions to ask for:

- Reduced complimentary guestroom policy (ex: 1 room night for 35 used)
- Complimentary event space
- Group rates to be extended to days before and after the event dates
- Discounts on catering and audio/visual rates
- Guestroom upgrades
- Suite upgrades
- Complimentary suites
- Reduced room rates for staff members (i.e. seminar committee members)
- Allow room block reduction of 20% with no penalty up to 90 days prior to event
- Complimentary microphone in banquet room and large meeting room
- Complimentary extension cords
- Complimentary power usage – if applicable
- Complimentary Wi-Fi in all guestrooms and meeting rooms
- Rebate per room night applied to final bill
- Ask for anything else you might want

Check the cancellation policy and make sure it is not too unreasonable

Be sure that there are Force Majeure and Indemnification clauses in the contract.

## SAMPLE HOTEL CONTRACT

### FUNCTION/RESERVATION CONTRACT

**DATE:**

**GROUP:** South Central Region Embroiderers' Guild of America

**CONTACT:** Region Director

**TELEPHONE:**

**FUNCTION:** South Central Region Embroiderers' Guild of America

**OFFICIAL DATES:** June \_\_\_\_\_ - June \_\_\_\_\_

**GUEST ROOM RATES:** The following rates will be confirmed for your meeting with return of a signed copy of this contract on or before

Mon	Tues	Wed	Thu	Fri	Sat	Sun
Standard Rooms						

Room	Single Rate	Double Rate	Triple Rate	Quad Rate
Standard Rooms				

Rates quoted are netted non-commissionable, and do not include surcharges and are subject to a \_\_\_\_% tax. All taxes are subject to change.

### RESERVATION PROCEDURE:

Reservations may also be made through the HOTEL website at WWW.\_\_\_\_ or by calling the hotel directly at (800) \_\_\_\_\_. Bookings made via other booking sources will be credited toward room block as long as the rates are equal to or higher than contracted group rates. Your promotion code for making reservations online will be issued once the signed contract is received.

### CHECK-IN/CHECK-OUT TIME:

Currently, check-in time is \_\_\_\_ p.m. and checkout time is \_\_\_\_ a.m. unless special arrangements are made in advance.

### CUT-OFF DATE:

File Name (The last updated date is in the form YYMMDD at the end of the file name): SCR SEMINAR GUIDELINES 240410.docx

Last Saved Date: 6/17/2024 2:45:00 PM

Printed Date: 0/0/0000 0:00:00 AM

Reservations will be accepted at the HOTEL until May \_\_\_\_\_. All rooms remaining in your block after that date will be returned to general inventory for sale to other groups and/or individuals. Any reservation requests received after the cut-off date will be accepted on a space available basis only.

#### **REVIEW DATE:**

Your group room block is subject to review with our Sales Manager at forty-five (45) and thirty (30) days prior to the CUT-OFF DATE of May \_\_\_\_\_. At these review dates, we will discuss the possibility of increasing or reducing your guestroom block, if necessary. Block adjustments are made based upon group room pick-up and/or group history. Block adjustments are made with proper written notification and by mutual consent of the HOTEL and South Central Region Embroiderers' Guild. It is understood, however, that should you not pick-up eighty-five percent (85%) of your contracted room block of \_\_\_\_\_ room nights then South Central Region Embroiderers' Guild will be assessed damages based on the difference between your actual total room pick-up and eighty-five percent (85%) of your total room block. This will be calculated on the highest single contracted room rate.

#### **COMPLIMENTARY ACCOMMODATIONS:**

The HOTEL shall provide one complimentary room night for each forty-(40) room nights actually utilized per night over the official conference dates. A room night consists of a bedroom or a sitting room of a suite occupied for one night.

A list of complimentary room assignments indicating guest name and address, type of accommodation desired, and arrival and departure dates should be sent to our Conference Coordinator at least thirty (30) days prior to the first arrival date. Credit will not be issued for complimentary room nights not utilized.

In addition to these accommodations, The HOTEL shall also provide ten (10) complimentary upgrades to the Concierge floor at no additional charge, as well as one (1) standard guest room at the discounted rate of \$\_\_\_\_\_. Thirty room nights will be discounted to a rate of \$\_\_\_\_\_ and two (2) complimentary Parlor suites will be included in the group's rooming block. Rooms adjoining the Parlor suite will be available at the regular block rate or the upgrades can be applied.

One (1) complimentary microphone will be supplied in each room used for meals throughout the function.

#### **PARKING/AIRPORT TRANSPORTATION:**



Date	Start Time	End Time	Function	Setup	Agr	Room Rental
6/13/	8:30 AM	4:30 PM	Break Out	Classroom	25	
6/13/	8:30 AM	4:30 PM	Break Out	Classroom	25	
6/13/	8:30 AM	4:30 PM	Break Out	Classroom	25	
6/13/	8:30 AM	4:30 PM	Break Out	Classroom	25	
6/13/	8:30 AM	4:30 PM	Break Out	Classroom	25	
6/13/	8:30 AM	4:30 PM	Break Out	Classroom	25	
6/13/	8:30 AM	4:30 PM	Break Out	Classroom	25	
6/13/	9:00 AM	11:00 PM	Displays	Display tables using 8 ft tables	Flow	
6/13/	11:30 AM	8:30 PM	Lunch/Dinner	Rounds of 8 Stage for evening	200	
6/13/	5:30 PM	6:30 PM	Cash Bar	Bistro Tables	Flow	Atrium
6/14/	8:00 AM	4:30 PM	Registration/ Information	4 6'x30" skirted tables w/ 8 Chairs	Flow	Atrium
6/14/	8:00 AM	10:00 PM	Office	Existing setup		
6/14/	8:30 AM	4:30 PM	Break Out	Classroom	50	
6/14/	8:30 AM	4:30 PM	Break Out	Classroom	25	
6/14/	8:30 AM	4:30 PM	Break Out	Classroom	25	
6/14/	8:30 AM	4:30 PM	Break Out	Classroom	25	
6/14/	8:30 AM	4:30 PM	Break Out	Classroom	25	
6/14/	8:30 AM	4:30 PM	Break Out	Classroom	25	
6/14/	8:30 AM	4:30 PM	Break Out	Classroom	25	
6/14/	8:30 AM	4:30 PM	Break Out	Classroom	25	
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6/14/	8:30 AM	4:30 PM	Break Out	Classroom	25	
6/14/	8:30 AM	4:30 PM	Break Out	Classroom	25	
6/14/	8:30 AM	4:30 PM	Break Out	Classroom	25	
6/14/	8:30 AM	4:30 PM	Break Out	Classroom	25	
6/14/	8:30 AM	4:30 PM	Break Out	Classroom	25	
6/14/	8:30 AM	4:30 PM	Break Out	Classroom	25	
6/14/	9:00 AM	2:00 PM	Displays	Display tables	Flo	
6/14/	11:30 AM	1:00 PM	Lunch	Rounds of 8	200	
6/15/	9:00 AM	2:00 PM	Displays	Strike		

***All meeting and banquet room assignments are to be determined. All prices listed in contract are subject to applicable taxes and service fees. Entertainment Policy: Live Bands and Disc Jockey's allowed only between 9:00 p.m. - 1:00 a.m. All other requests must be approved by Hotel. The Patrons and Guests agree not to bring any food or beverage of any kind into or out of the hotel.***

**EXHIBITS:** The HOTEL will provide tabletop exhibits included in the room rental for the use of twenty (20) to fifty (50) tables throughout the dates of the block, plus applicable sales tax, and service charges. The tabletop exhibits consist of one six-foot skirted table, one chair and a trash can. Electrical requirements will be provided at an additional charge.

#### **FOOD AND BEVERAGE:**

Pricing will be guaranteed three (3) months prior to your function. Menu suggestions are available from our catering department. Prices do not include applicable taxes (9%) and service charges (20%). Taxes are subject to change.



Menu arrangements should be finalized at least forty-five (45) days prior to each function and a guarantee of the number of guests at each function is needed at least three (3) business days (Monday-Friday) in advance.

Food and beverage functions listed in meeting space, based upon current average menu prices, will guarantee a minimum food and beverage expenditure of \$00,000.00 excluding applicable 9% tax and 20% gratuity. Taxes are subject to change. It is understood, however, should food and beverage expenditure fall below this minimum and the HOTEL reserves the right to assess fees in the amount of the difference.

**PACKAGE POLICY:** The HOTEL has procedures for handling meeting, convention, and exhibitor shipments. Please contact your Conference Coordinator for information on charges and procedures.

**AUDIO/VISUAL REQUIREMENTS:** All audiovisual equipment, except white boards, flip charts, easels, and extension cords, must be supplied through the HOTEL on-site Audio/visual Company. Please contact Conference Services at TELEPHONE NUMBER for details.

#### **CREDIT PROCEDURES:**

An account for food and beverage, room and miscellaneous charges connected with your conference may be established by completing the enclosed credit application, pending approval of our accounting department. Receipt of credit application is required with the return of the contract.

For your protection, it is important that our Credit Manager be given a full list of those who have master account signing privileges, together with any expenditure limits that you may wish to impose.

Any unpaid authorized master account charges will be transferred to the master bill and will become the responsibility of South Central Region Embroiderers' Guild of America. All charges are due and payable within fifteen (15) days of receipt of invoice. Any balance unpaid after thirty (30) days is subject to a 1.5% per month FINANCE CHARGE (which is an 18% ANNUAL PERCENTAGE RATE).

#### **GENERAL LIABILITY:**

The HOTEL reserves the right to inspect and control all functions. Damage to the hotel premises will be the responsibility of South Central Region Embroiderers' Guild of America at sponsored functions. The Hotel is not responsible for loss or damage to any samples, display, properties, or personal effects brought into the Hotel.

**The use of pyrotechnics, fireworks, any electrical device intended to cause sparks, or any other materials or devices that could initiate flames or fire, or use of any other flammable materials are strictly prohibited on hotel property. Under no circumstances are any such items to be permitted.**

#### **APPROVAL:**

If the contract meets with your approval, please sign, and return the original. The receipt and acceptance by the Hotel of the signed contract establishes this program on a "definite" status and represents your commitment to hold this program at the HOTEL. Until confirmation, all space and arrangements are on a tentative, right of first refusal basis only. This contract is based on the guestroom block, meeting space requirements and meal functions as outlined. Any changes in the aforementioned may necessitate renegotiations of this contract.

#### **TERMINATION CLAUSE**

It is provided that there shall be no right of termination for the sole purpose of holding the same reasonably similar function in another hotel or city.

#### **CANCELLATION CLAUSE**

If arrangements for this meeting are canceled, a cancellation fee will be charged consisting of a percentage of total anticipated revenue based on contracted arrangements for guest rooms (contracted bedroom occupancy multiplied by the highest contracted single rate), function space (meeting room rental), and food and beverage requirements at the time of cancellation.

Any notification of cancellation must be received in writing.

If definite booking is canceled for reasons other than fire, catastrophe, or Act of God, the party canceling the conference is liable to the other party for a fee based on the following percentage of total contracted revenue. The fee is determined by the time between the cancellation and scheduled arrival date as follows:

Notice of Cancellation Prior to Arrival	Percent of Revenue
89 or less days	100%
90-119 days	75%
120-179 days	50%
180-269 days	25%
270 or more days	10%

#### **FORCE MAJEURE**

The performance of this Agreement is subject to any circumstance making it illegal or impossible to provide or use the Hotel facilities, including acts of God, war, government regulations, disaster, strikes, civil disorder, or curtailment of transportation facilities. The Agreement may be terminated only for any one of the above reasons by written notice from either Hotel or Organization to the other within ten (10) days of learning of the basis for termination. Neither change of ownership or management of the Hotel, nor change in management of Organization shall relieve either party of the responsibilities and obligations of this Agreement.

## **INDEMNIFICATION**

Hotel agrees to indemnify and hold the Organization, its officers, trustees, and employees harmless from any loss, damage, cost and expense incurred by Hotel which results from claims brought against Organization due to Hotels' or its employees', contractors', or agents' negligence, willful misconduct or failure to perform pursuant to the terms of this Agreement.

Organization agrees to indemnify and hold Hotel, its officers, trustees, and employees harmless from any loss, damage, cost, and expense incurred by Organization which results in claims brought against Hotel due to Organizations' or its employees', contractors', or agents' negligence, willful misconduct, or failure to perform pursuant to the terms of this Agreement.

## **OPTION DATE:**

These dates and rooms will be reserved on a first option basis until DATE by which time the Hotel asks that you return a signed copy of this agreement. In the event we have a request for your dates from another organization prior to the above date, we will contact you for a definite decision to confirm or release these dates in writing within 48 hours. If we have not received your confirmation by this date, the hotel reserves the right to release all space for resale.

## BINDING AGREEMENT

This agreement contains all of the terms agreed on by the parties with respect to the subject matter of the Agreement and supersedes all prior arrangements and communications between the parties concerning such subject matter, whether oral or written. This Agreement may be altered or amended at any time by the mutual written agreement of the parties.

### AUTHORIZATION:

In the event that this agreement is signed in the name of a corporation, partnership, association, club, or society, the person signing represents to the Hotel that the individual has full authority to sign the agreement and will be personally responsible for the terms of the agreement. Until the <HOTEL> receives this original document, all arrangements remain on a tentative basis.

For: South Central Region Embroiderers'  
Guild of America

Accepted by: HOTEL

\_\_\_\_\_  
Name

\_\_\_\_\_  
Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Title

\_\_\_\_\_  
Sales Manager

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

## EVENT SCHEDULE AND ROOM REQUIREMENTS SAMPLE

DATE/TIME	FUNCTION	CHAIR	ROOM	PEOPLE
Wed., June 4 8:00am - 5:30pm	Registration	B. Phillips Registrar	Lobby	275
9:30a.m. - 11:30a.m.	Region Day Officer training	S. Smith Asst. RD	France	75

Circular tables with 10-

12 chairs for roundtable discussions - use corner room plenty of space between tables

1:30p.m. - 3:30p.m.	Region Day	M. Brown	England	150
	Color workshop	Spec. Events		
	Classroom style,	Chair narrow tables end to end in rows -		
		3 chairs per table	Screen in front, projector/ remote control, sound	
	system			
	2 tables for display			

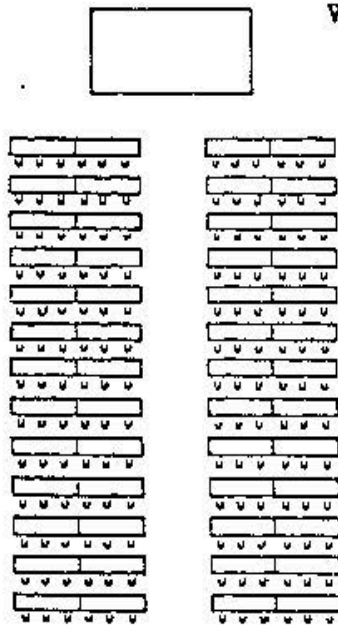
7:30pm - 9:00pm	Board Meeting	P. Pruitt	England	150
			Secretary	

Tables, skirted

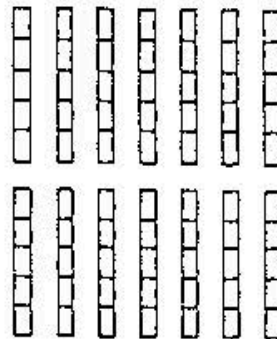
A "U" with Executive seated across at bottom of "U" Alphabetical seating of Reps beginning with A on left to Z on right.

Podium, sound system/microphone, 2 tables for sign in of reps and guests.

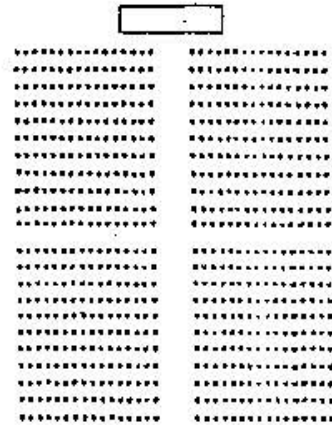
## VARIOUS ROOM CONFIGURATIONS



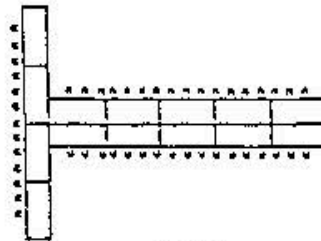
Schoolroom.



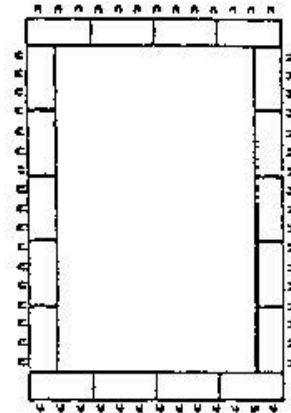
Schoolroom, perpendicular.



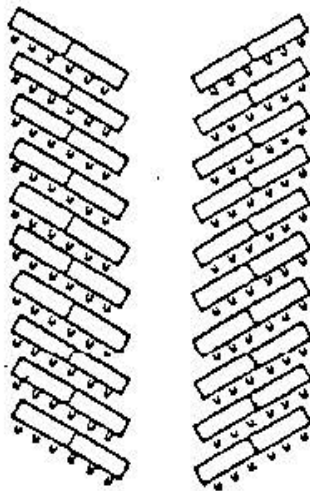
Auditorium, conventional.



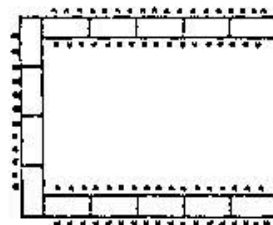
T-Shape.



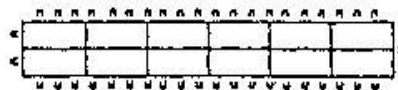
Hollow Square.



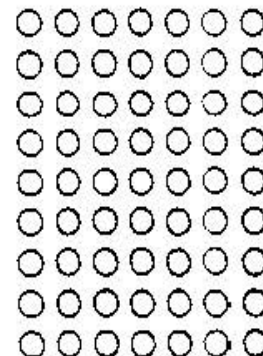
Schoolroom, v-shape.



U-Shape.



Board of Directors.



Round Tables.

## ***REGISTRAR***

Each seminar may choose the mechanism to electronically maintain registration information. Some options are Excel, Access, or other database.

In all cases, care should be taken to protect the personal information of each participant whether student, faculty, merchandise event vendor, etc.

## ***FACULTY***

A teacher need not be EGA certified, an EGA member or even an embroiderer to teach at a seminar.

The procedure for contracting with foreign teachers is outlined in the National Policies.

## **INVITATIONS TO TEACHERS - TIMELINE**

Invitations to propose can be sent as a general invitation in EGA publications, chapter, or region newsletters, to a specific teacher, via the National EGA email communications, NETA website or a combination of all the above.

A selection process time-line must consider the time needed to mail information, prepare proposals, evaluate proposals, mail contracts, receive information for the website/brochure, and prepare the website/brochure prior to publication. **This may take over two years.** The dean of faculty works with the seminar executive committee to set up this schedule. It is essential that the faculty committee strictly adhere to the time-line.

## **PROPOSAL SOLICITATION – SAMPLE EMAIL**

<Seminar Logo>

<Date>

Greeting Teachers!

The South Central Region EGA Seminar 20xx, **<theme>**, sponsored by <Host Unit> will be held June <dates>, 20xx at <Location> in <City, State>.

**This is your invitation to submit proposals and join in the fun!**

A variety of 1-, 2- and 3-day classes will be offered in several techniques and proficiency levels. We encourage you to submit a variety of proposals of multiple lengths (1, 2, or 3 days) to allow us to balance our schedule; as we strive to contract a teacher for all 3 teaching days. The classes will be on Thursday June <date>, Friday, June <date>, and Saturday, June <date>.

Teacher compensation will include:

- \$<Amount> per day for teaching.
- Economy round-trip airfare, parking at airport and transportation to/from home airport, or current 20xx IRS mileage rate for traveling by automobile from home to <City>.
- Hotel accommodations – choice of room options are:
  - Private room for four nights – Wednesday through Saturday.
  - Room with another teacher and we will pay for five nights (Tuesday through Saturday or Wednesday through Sunday).
  - Room with someone other than another teacher who is attending seminar and we will pay your share for five nights (Tuesday through Saturday or Wednesday through Sunday).
- Meals will be provided during the period of the contract:
  - Three lunches on seminar class days and one seminar banquet.
  - \$<Amount> per diem for other meals and incidentals.

We look forward to receiving your proposal(s). Please reply to this email indicating your plan to participate. **Submit your proposal(s) with picture or sketch electronically or by postal service, whichever is convenient for you, no later than <Date>.** As requested by EGA, the “**ICNA Standard Proposal Summary Sheet**” must be the first page of each proposal. This form, along with other important information, is available on our website at [scr20xxseminar.org](http://scr20xxseminar.org).

Sincerely,

<Name>, Dean of Faculty

SCR Seminar 20xx

<Address>

<Phone Number>

[scr20xxfacultychair@gmail.com](mailto:scr20xxfacultychair@gmail.com)



## CALL FOR TEACHERS SAMPLE NOTICE

# Teacher Proposals Being Accepted for SCR Seminar 20xx <Insert Logo here>

*Join the fun in <City, State> at SCR Seminar 20xx <Name of Seminar>! Teacher proposals are now being accepted. For submission information and forms, visit [www.scr20xxseminar.org](http://www.scr20xxseminar.org). Submission deadline is <Date>.*

*For more information, contact  
[scr20xxfacultychair@gmail.com](mailto:scr20xxfacultychair@gmail.com)*

## PROPOSAL SUBMISSION GUIDELINES

<Logo>

### Proposal Submission Guidelines

SCR Seminar 20xx

<Theme>

June <Dates>, 20xx

### Class Offerings

The <Host Unit> of The Embroiderers' Guild of America, (EGA) is hosting the South Central Region (SCR) Seminar Wednesday through Saturday, June <Dates>, 20xx at the <Location> in <City, State>. The teaching opportunities are: 3 days, 2 days, and 1 day. If the proposed class is less than a 3-day, you must combine 2-day and 1-day classes to total three (3) teaching days.

### Teacher Attendance

All classes will be held in the <Location>. Teachers will be expected to arrive no later than Wednesday, June <Date>, 20xx, unless otherwise advised at the time of selection confirmation.

### Proposals

The teaching proposal must be your own concept. Set-pieces should have a design that is either original and is solely the creative product of the teacher, or an adaptation which has been inspired by another source and has been modified through significant changes. We encourage you to submit several proposals for each class length for which you would like to be considered so the Faculty Selection Committee has adequate choices. Please submit a total of no more than four (4) proposals for each class length.

Contracted class projects shall not be taught within SCR for 90 days before seminar or for 90 days following seminar.

**Each proposal must include the following information:**

1. A course description, similar to that required for a seminar brochure, which includes class goals.
2. A biographical resume of not more than one page, which should include your embroidery education or other qualifications relevant to the proposed course, teaching experience, and areas of specialization.
3. Class length (3-day, 2-day or 1-day).
4. Design size.
5. Estimated time for any required pre-work.
6. Estimated cost of kit and student supply list or lab fee, if applicable.
7. Student proficiency level:
  - a. **Basic** The stitcher has no experience in the technique being taught.
  - b. **Basic Intermediate** – The stitcher has limited experience in the technique being taught or material being used.
  - c. **Intermediate** – The stitcher has knowledge of the basic stitches, the materials, and their use in the given technique.
  - d. **Advanced intermediate** – the stitcher has some knowledge of more difficult stitches in the technique and a wider variety of materials.
  - e. **Advanced** – The stitcher has the ability to execute simple and difficult stitches in the technique. The stitcher also has knowledge of color and design, which will allow for exploration and creativity.

**For a set-piece:**

- A detailed drawing, colored illustration, and/or chart are acceptable. **However, a finished set-piece, work in progress, or photographs of proposed set-piece(s) are preferred.**
- The type of materials used such as the background fabric, fabric count/canvas mesh, types of threads/yarns, size and types of beads, etc.
- If a drawing, illustration, or chart is submitted, a worked example of the proposed techniques or an example of the teacher's work (photographs are acceptable).
- If the piece is finished in an unusual manner, please indicate if the finishing materials (such as a box or frame) are available for student purchase and are included in the estimated cost.

**For a notebook course:**

- A page layout.
- Photograph of a sample page.

**Proposal Presentation**

Proposal packets may be sent by electronic mail or snail-mail (USPS, FedEx, or UPS). If proposal packets are snail-mailed they will be returned certified or insured so that the recipient must sign for the package. Packets will be returned on or before **<Date>**, at which time teachers will be notified of the class status. The seminar committee will be responsible for return postage.

### **Submission via electronic mail**

1. Submit one proposal per email.
2. All proposals shall be submitted on the same day.
3. Each page of the proposal should be clearly labeled with the individual project and page number and be identified with the teacher's name.
4. Each proposal must have the completed **ICNA Standard Proposal Summary Sheet** included.
5. Each teacher must submit one completed **Proposal Item Description Sheet** summarizing all submissions.
6. Number each proposal to match its number on the **Proposal Item Description Sheet**.
7. Each email must be no more than 20 MB in size.
8. The SCR Seminar faculty committee will acknowledge receipt of the teacher's proposal(s) as listed on her/his **Proposal Item Description Sheet**.

### **Submission via snail mail**

1. Place each proposal securely in a separate folder or binder.
2. Use separate plastic protective sleeves for materials in the folder to protect them from undue handling and for safekeeping.
3. All materials should be clearly labeled with the individual project and identified with the teacher's name.
4. Each proposal must have the completed ICNA Standard Proposal Summary Sheet included.
5. Include a completed Proposal Item Description Sheet listing all items enclosed in the proposal packet.
6. Number each proposal to match its number on the Proposal Item Description Sheet.
7. Include a completed return address label.
8. Mail all items in the same appropriately-sized padded envelope. The envelope should be reusable. **Proposals must be received no later than <date>.**

### **Selected Class Pieces**

All selected set-pieces **MUST** be in their final form and available for display at SCR Seminar 20xx in <city, state>, June <date>.

### **Please mail proposals to:**

<Name>, Dean of Faculty

SCR Seminar 20xx

<Address>

<City, state, zip>

<Phone>

scr20xxfacultychair@gmail.com

## ICNA Standard Proposal Summary Sheet

*The cover of your proposal must be a picture, line drawing or other visual representation of your class. This form must be the first inside page of the proposal.*

Name \_\_\_\_\_

Address \_\_\_\_\_

City, State and Zip \_\_\_\_\_

Contact Information: (phone) \_\_\_\_\_ (cell phone) \_\_\_\_\_  
(email) \_\_\_\_\_

1. Class Title: \_\_\_\_\_

2. Technique: \_\_\_\_\_

3. Ground material: \_\_\_\_\_

4. Type of Class \_\_\_ set project \_\_\_ color and/or design class  
\_\_\_ notebook \_\_\_ other (explain): \_\_\_\_\_

5. Length of class (specify hours or days): \_\_\_\_\_

6. Student Level: \_\_\_ basic \_\_\_ advanced intermediate  
\_\_\_ basic-intermediate \_\_\_ advanced  
\_\_\_ intermediate \_\_\_ all levels

7. Kit: estimated kit cost (in US dollars): \_\_\_\_\_  
\_\_\_ cost is for complete kit (other than stretcher bars, frame or hoop and usual class stitching supplies)  
\_\_\_ student must purchase other materials (list items and approximate cost):  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_ student will have a choice of color and/or threads

8. Audio/Visual Equipment Needed: \_\_\_\_\_

9. Other special classroom needs: \_\_\_\_\_

10. Prestitching required: \_\_\_ yes: Number of hours: \_\_\_\_\_  
\_\_\_ no

11. Has this project ever been accepted by another seminar, sold commercially or taught? \_\_\_\_\_

If yes, please elaborate: \_\_\_\_\_

# SCR Seminar 20xx Proposal Summary Sheet

<Date>

SCR EGA Region Seminar 20xx

June <Date>

<City, State>

*Please complete ONE form listing all proposals submitted*

Teacher's Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

May we call you with questions at this phone number? \_\_\_\_\_ Alternate # \_\_\_\_\_

## Proposal Packet Contents (describe the proposals you are submitting)

### 3-Day Classes

Proposal #	Class Title

### 2-Day Classes

Proposal #	Class Title

### 1-Day Classes

Proposal #	Class Title

## Supporting Materials (fill in the number of items you are submitting):

\_\_\_\_\_ Photographs of previous work (not included in proposal folder)

\_\_\_\_\_ Biographical resume (if not included in proposal folder)

\_\_\_\_\_ Additions (please list) \_\_\_\_\_

\_\_\_\_\_ **TOTAL Number of Items Sent**

**Please include a return shipping label for proposals to be returned by mail. Mail proposals and questions to:**

<Name>, Dean of Faculty

SCR Seminar 20xx

<Address>

<City, State, Zip>

<Phone>

scr20xxfacultychair@gmail.com

It is recommended the following process be used when rating the various classes.

1. Create an electronic version of all proposals. It is highly recommended that all proposals are in a PDF format.
2. Place the proposals either “in the cloud” (Dropbox, Google Drive, One Drive are all possible options. Email a link to the proposals to the faculty selection committee members. An alternative is to place the proposals on individual thumb drives which are then distributed to the faculty selection committee members.
3. Create a spreadsheet of all classes. (See PROPOSAL RATING SHEET – EXCEL SUMMARY below for a sample).
4. Email the spreadsheet to the faculty selection committee. This should be done 1 – 2 weeks before the selection meeting.
5. The committee members then score the proposals in their column of the spreadsheet, taking care not to sort the spreadsheet.
6. Once all scores have been received and recorded on the master list, the top 15 – 20 classes are reviewed by the committee.

## PROPOSAL RATING SHEET

Teacher: (Name)

Proposal Number:

Category: (Category) Project: (Title)

Technique: (Technique)

Class Length: (Length) Level: (Level) Kit Cost: (\$Kit

Cost)

	5	4	3	2	1	0
Evaluator #1						
Evaluator #2						
Evaluator #3						
Evaluator #4						
Evaluator #5						
Total						

Consider all aspects of the embroidery: overall impact, design, color, workmanship suitability, kit cost and presentation.

Score each entry as follows:

**5 points** - innovative, distinctive, appealing, shows great originality and positive challenge to students. Suitable for time frame and student proficiency level.

**4 points** - Excellent proposal and outstanding in many respects, but lacks the total appeal to receive 5 points.

**3 points** - Competent, but not outstanding.

**2 points** - Has merit, but is not seminar material.

**1 point** - Poor concept and/or design.

**0 point** - Unacceptable concept and/or design.

Note: It is highly recommended the rating data is entered into an Excel spreadsheet as the ratings are completed. This will make the selection process go much smoother.

## LETTER/EMAIL OF ACCEPTANCE

Dear ,

We are very pleased to inform you that you have been selected for the faculty for \_\_\_\_\_ Seminar held from (date to date) at (facility, city, and state).

Please review the contract very carefully. If you are in agreement, either:

1. Print and sign one (1) copy of the contract. Scan the signed copy and return to me via email at scr20xxfacultychair@gmail.com (time stamped on or before <date> 11:59 PM Central Time). One fully executed contract will be emailed to you for your files. If you choose this option, you agree that a scanned signature on this document is authorized and may substitute for an original signature wherever a signature is required.

Or

2. Print three (3) copies, sign all copies and return to me via postal service or overnight carrier (postmarked on or before <date>). One fully executed contract will be returned to you via postal service or overnight carrier for your files.

Thank you for submitting your work. *<Remove this sentence if the proposals were sent electronically. It is being returned to you via UPS, Federal Express or Post Office at your request.>*

As a reminder, I am enclosing a teacher information sheet and timeline.

Cordially,

Dean of Faculty  
SCR Seminar 20xx  
scr20xxfacultychair@gmail.com

Note: The letter of Acceptance may be emailed to the teacher. The seminar may wish to notify all accepted teachers via email, and then return any hard copy proposals under separate cover.



## LETTER OF REGRET

Dear

The selection committee for SCR Region Seminar has met and deliberated over the selection of our faculty. After carefully reading and considering all proposals, we are sorry that your proposals were not among our class selections.

Teachers often wonder why they were not chosen. We were impressed by the professional presentations received. Most often, it was a choice between several proposals in a given category and our only being able to select one.

Thank you so much for the time and effort you spent in preparing your proposals. Without that effort, the selection process would not have been as challenging as it was for us.

*<Remove this paragraph if no hard copy proposals were received. >*The hard copy proposals you provided are being returned to you via postal service *<Optionally>* with a signature of receipt required.

We appreciate your participation.  
Sincerely,

Dean of Faculty  
SCR Seminar 20xx  
scr20xxfacultychair@gmail.com

## FOREIGN TEACHERS

**The Foreign Teacher with Visa contract is mandatory and shall not be changed.**

**Note: This entire process requires a minimum of six months to complete. It is imperative that enough time be allowed to prepare and submit the proper documentation.**

- a. To hire a foreign teacher, it is necessary to ask the teachers which type of visa they will be using to enter the USA.**
- b. The seminar chair will submit the foreign teachers' names to EGA Headquarters before sending contract to these individuals.**
- c. EGA executive director will contact the teachers to learn their visa status and that information will be sent to the seminar chair immediately on receipt. The proper contract will be sent to the foreign teacher by the seminar faculty committee chair.**
- d. Once a signed contract is received from the foreign teacher, it is sent to the executive director at EGA headquarters for submittal to the US Bureau of Citizenship and Immigration Services.**

**e. The required INS processing fee is the responsibility of the region seminar.**

IF YOUR SEMINAR IS HIRING A FOREIGN TEACHER, PLEASE GO TO THE EGA HEADQUARTERS WEBSITE, "MEMBERS ONLY SECTION, DOCUMENTS DOWNLOAD, TEACHERS CONTRACTS" FOR A SAMPLE CONTRACT  
[WWW.EGAUSA.ORG](http://WWW.EGAUSA.ORG)

## **EGA SCR SEMINAR CONTRACT FOR TEACHING SERVICES U.S.**

The current region seminar contract may be found on the EGA website, [WWW.EGAUSA.ORG](http://WWW.EGAUSA.ORG), in the "MEMBERS ONLY SECTION, DOCUMENTS DOWNLOAD, TEACHERS CONTRACTS".

If your seminar wishes to accept scanned signatures, be sure the following sentence is added to the contract. "The parties agree that a scanned signature on this document is authorized and may substitute for an original signature wherever a signature is required."

## **TEACHER INFORMATION – SAMPLE LETTER OR EMAIL**

Dear Faculty Member:

(Insert a personal greeting here.)

### **1. Seminar Brochure and Registration Form**

Our brochure and registration form have been publicized on our website [scr20xxseminar.org](http://scr20xxseminar.org).

We invite you to participate in other activities planned, as well as Teacher Showcase and Merchandise Event. The cost of optional activities is your responsibility. Please complete the registration form following the instructions on the website. Please note the registration deadline is *<insert date here>*.

### **2. Class Assignments**

A list of your students with their email and mailing addresses will be emailed to you by *(insert date.)*

### **3. Student Letters**

Please email or mail your welcome letters to your students no later than *<insert date>*. Additionally, please send a copy of your letter to me for the files.

### **4. Kits**

Remember that if you are mailing kits, they must arrive no later than *(insert date.)* Please indicate on the outside of package: Hold for *(insert seminar name.)* *(Insert name of person and address where the kits are to be sent.)*

I am enclosing a list of the participating faculty. If you choose to have a roommate, please send your preference by *(insert postmark date)*.

We look forward to having you on our faculty.

Sincerely,

Dean of Faculty  
Address  
scr20xxfacultychair@gmail.com  
Telephone number

## **TEACHER SHOWCASE SAMPLE LETTER**

LOGO

DATE

Dear Teacher's Name,

<Chapter name> welcomes you to <Name of Seminar>, SCR Seminar 20xx. We are pleased to inform you that we will be having a Teacher's Showcase on <Day and Date>, from <time> to <time>.

Teacher's Showcase is an opportunity for you to display your portfolio of classes that you are currently teaching. Chapters will be able to view your designs, discuss your teaching fees, and the possibility of you coming to their area to teach.

Please contact me at the email address below if you are interested in participating, and we will make certain that a table is reserved for you.

Sincerely,  
<Teacher Showcase Chair>  
Teacher's Showcase  
SCR Seminar 20xx  
scr20xxteachersshowcase@gmail.com

## EVALUATION BY TEACHER (OPTIONAL)

*Note: each seminar committee may decide to ask the teachers to fill these forms out or not.*

Please complete and mail to:

(Seminar chair) (Address)  
(Telephone Number)

NAME OF CLASS:

NAME OF TEACHER:

1. Were arrangements handled in a competent and businesslike manner?
2. Was the contract fair and were its stipulations followed?
3. Were the classroom conditions satisfactory (lighting, traffic flow, blackboard available, size adequate)?
4. Were the housing accommodations satisfactory?
5. Were the travel arrangements satisfactory?
6. Were the students enrolled in a class that fit their level of expertise?
7. Were the students well prepared to take the class?
8. If advance preparation or special material were required, was the group prepared adequately for the class?
9. Were good manners observed during class?
10. Were the students receptive and attentive?
11. Would you look forward to teaching for this group again?

COMMENTS

## STUDENT EVALUATION FORM (Optional)

*Note: each seminar committee may decide to ask the students to fill these forms out or not.*

Angels: please distribute this form in class. Return the completed copies to:

---

TEACHER:

CLASS TITLE:

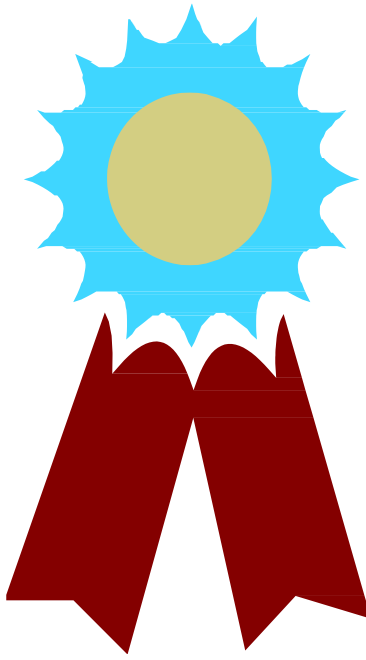
1. Was the class as described in the brochure?
2. Did you receive adequate information from your teacher before seminar?
3. If your class included a kit, were the materials furnished adequate in amount and of good quality?
4. Were written instructions understandable and adequate so that you can complete the project at home?
5. Was the teacher's presentation organized and were verbal instructions clear and understandable?
6. Was individual help available when needed?
7. Did you feel the classroom instruction was organized to fit the amount of time available?
8. Would you take another class from this teacher? Yes or No. (If no, please explain.)
9. Did your classroom provide sufficient workspace and good lighting?

Continue on reverse side, as needed.

COMMENTS:

# STUDENT CERTIFICATE

(Optional)



## REGION SEMINAR

This is to certify that

\_\_\_\_\_  
(Name)

Has successfully completed

\_\_\_\_\_  
(Course)

\_\_\_\_\_  
Chairman

\_\_\_\_\_  
Instructor

## **MINI CLASS CONTRACT**

### TEACHER CONTRACT – Mini Class

This is to confirm that Teachers Name, agrees to teach for <Chapter>, EGA, on

DATE:

TIME:

PLACE:

WORKSHOP NAME: Workshop Name

SKILL LEVEL: All Levels TEACHING FEE: \$\_\_\_\_\_ MAXIMUM ENROLLMENT: \_\_\_\_\_

KIT COSTS: \$\_\_\_\_\_

*Teacher agrees to use top quality products for class project in an amount not to exceed current retail prices at the time of shipment.*

*Teacher gives the Region permission to publicize class on EGA Web sites through photograph, class description, and/or teacher resume. \_\_\_\_\_Teacher's initials 7/98*

**NOTE:** *The Chapter agrees to notify the Teacher as soon as possible, but no later than the Cancellation Date shown below, the number of kits required. There may be no changes in the number of kits required 14 days prior to the departure date.*

EQUIPMENT REQUIREMENTS: \_\_\_\_\_

\_\_\_\_\_

TRANSPORTATION COSTS:

HOUSING AND PER DIEM:

CANCELLATION DATE: \_\_\_\_\_. This contract cannot be cancelled by the region within 30 days of the departure date of The Teacher. The Teacher agrees to give 30 days notice of cancellation, if necessary.

\_\_\_\_\_

Dated: \_\_\_\_\_ Teacher Signature

OR

\_\_\_\_\_

By: \_\_\_\_\_

Date \_\_\_\_\_ Business Name

\_\_\_\_\_

Title

PLEASE PRINT

Address \_\_\_\_\_

City, State, Zip Code \_\_\_\_\_

Telephone: (    ) \_\_\_\_\_ Fax (    ) \_\_\_\_\_

E-mail: \_\_\_\_\_

Dated: \_\_\_\_\_

By: \_\_\_\_\_

<Chapter President>



## TEACHER REIMBURSEMENT FORM

**SCR Seminar 20xx Teacher Expense Reporting Form**[illegible]

## SECTION V – PROTOCOL

### ***PROTOCOL BASICS***

Protocol is an important part of any organizational structure, whether at the local chapter, regional or national level. The rules of protocol follow good sense and common courtesy.

#### RECOGNIZING REGION AND NATIONAL OFFICERS

- The head of each chapter, region and national organization should receive recognition for her position. You are honoring the position, not necessarily the person.
- All region officers should be considered paying guests of the seminar, except the region director. Even though they pay their own way, courtesy demands that they be treated in accordance with their position in the organization. Although teachers are paid, most seminars also treat teachers as guests of the seminar.
- The National President should be extended an invitation (by the region director) to attend the seminar, at least part-time. If possible, registration, transportation and accommodation costs may be provided. Class kits would be paid by the National President.

#### MEAL FUNCTIONS

- **SEATING:** At a head table, guests should be seated on either side of the presiding officer (i.e., seminar chair or region director), in order of descending rank. The president of the host unit should be included. The National President is the ranking officer; the region director is next, followed by the Chapter President, the seminar chair and then the remainder of the region officers and the seminar committee chairs. Each person at the head table should receive a written invitation indicating the time they are expected to be in place at the meal.
- **AGENDA:** An agenda for each meal should be prepared by the seminar chair.
  - **INTRODUCTIONS:** People at the head table should be introduced in order of rank.
  - **BRIEF WELCOME** by the chapter's ranking officer/seminar chair and the region director.
  - **ANNOUNCEMENTS**
  - **NON-SECTARIAN INVOCATION** may be offered.
  - **EAT**

The hotel staff should be informed of the anticipated length of announcements and expected eating time and be reminded to serve the head table first.

#### RECEIVING LINES (Optional)

- A receiving line honors the officers and special guests.
- Each person in the receiving line should receive a written invitation indicating the time they are expected to be in place at each event.

- A receiving line should be set up at the beginning of a cocktail or reception hour in a location close to the entrance.
- The seminar chair and the host unit's ranking officer may act as the hostess in the receiving line to introduce the members to, for example, the National President, national officers, region director, region officers (who should stand in order of rank: RD, ARD, Secretary, treasurer).

More protocol on 'Speakers and General Guests,' 'Seating by Rank and Role' and the 'Introduction of Guests' can be found under the member's only section on the national website, [www.egausa.org](http://www.egausa.org), Manuals & Guides, Region Seminar Guidelines, Section 1, C. pgs 7-9.

## SAMPLE LETTER – INVITATION TO NATIONAL PRESIDENT

Note: Who pays what?

- Region pays her registration fee
- Seminar pays for her hotel
- National pays her travel.
- The National President pays for her own kit.

Date

Salutation

The members of South Central Region would like to invite you to our

\_\_\_\_\_  
(Year/name of seminar)

South Central Region seminar in

\_\_\_\_\_  
(City/State)

The seminar will be held \_\_\_\_\_ at the

(Date)

\_\_\_\_\_  
(Name of facility)

*<In odd numbered years>* Our officers will also be installed at this seminar. We would be delighted if you would do the installation at the Friday night banquet.

Your hotel and seminar registration fee will be paid by the Region. If you choose to take a class, kit fees would be at your own expense. The seminar brochure can be found at [SCR20xxSeminar.org](http://SCR20xxSeminar.org).

We hope you can join us for the whole seminar – but, if not, for part of it. Please let me know if you can come and we'll make your seminar registration and hotel arrangements.

Sincerely,

SIGNATURE

South Central Region RD

[scr.regiondirector@gmail.com](mailto:scr.regiondirector@gmail.com)

## Appendix A – Logo Approval

**See the EGA Officer's Notebook, Section IV (Chapter Policies), p3. LOGO APPROVAL for up to date information – Submit to EGA National Headquarters**

When designing or revising logos, chapter, region, and seminar committees, must submit the designs to EGA Headquarters for review and approval before printing or manufacturing any item.

The process to have a logo approved is for the group requesting approval to use a logo submits a PDF or jpeg file it via email to EGA Headquarters at [egahq@egausa.org](mailto:egahq@egausa.org).

Headquarters staff and the Director of Marketing reviews the logo's appropriateness according to EGA brand standards. Usually within 5 days a decision is made and sent back to the group which requested it. If there are questions about the logo or suggestions about ways to change it they are sent to the requesting group ASAP. If needed, a group has a chance to redesign the logo or explain why it should remain as originally submitted.

- The sponsoring group must be clearly identified on the logo.
  - The EGA trademark or logo must be included to show affiliation. The EGA trademarks are the words "The Embroiderers' Guild of America", the current logo, and the letters "EGA".
  - **The seminar logo must contain the registered trademark symbol, ® by the EGA logo.**
- Tips to help determine whether to contact the product design and sales committee before using a logo for other than the original designated purpose:
    - Does it include the logo or other EGA trademark?
    - The logo of The Embroiderers' Guild of America by itself may be used only at the national level for products to be sold or given as gifts or souvenirs.
    - Logos for chapters, regions, and seminars must incorporate or be accompanied by the national trademark (in any of its three forms) to show affiliation with the national organization. The sponsoring group must be clearly identified in each case, either by incorporating the group name in the logo or by using the group name along with the logo.
    - The background around the logo must be light-colored, so that the logo is not lost.

- Take into consideration the suitability, relative size, and the design of the item you wish to produce with the parallel characteristics of the existing logo. Updated 2/2020: Logo use: even if your logo has been approved it may not be reproduced as approved when printed on products for distribution and/or sale. Submit a sample of the requested use to [egahq@egausa.org](mailto:egahq@egausa.org) PRIOR to ordering. This includes, but is not limited to, the pin, totebag and website. Possible uses for a logo:

Appreciation certificates	Envelopes	Note pads
Aprons	Exhibit award ribbons	Paper weights
Banners	Exhibit brochure covers	Pencils
Book plates	Hats	Pens
Brochure covers	Letterhead	Pins
Bumper stickers	Membership brochures	Project book covers
Calendars	Mugs	Stickers
Collars	Napkins	Stitch instructions
Cookbook covers	Newsletter headings	Sweat shirts, t-shirts
Decals	Note books	Tabards
Desk paraphernalia	Note cards	Totes

## Appendix B – Seminar Email Addresses

A seminar email address is used to allow interested parties, teachers, students, other seminar committee members, SCR board members, etc., to easily email seminar committee members without knowing their personal email address. This will ensure the privacy of committee member's email addresses and provide consistent contact information year after year of key seminar committee leads and committee members.

- The seminar chair will supply the seminar webmaster the committee chair's preferred personal email address. This will be used by the seminar webmaster to send instructions on how to access their seminar email account(s).
- The committee chairs will work with the seminar webmaster to learn how to access their email account to view and send emails from the seminar address. Please note: The seminar webmaster will maintain the committee chair email passwords. She will change them upon request and/or as necessary.
- The following email addresses will be configured each year. Each seminar may create additional addresses as necessary.
  - Seminar Chairman – scr20xxseminarchair@gmail.com
  - Seminar Vice Chairman – scr20xxvicechair@gmail.com
  - Dean of Faculty – scr20xxfacultychair@gmail.com
  - Registrar – scr20xxregistrar@gmail.com
  - Hospitality Chairman – scr20xxhospitality@gmail.com
  - Hotel Liaison – scr20xxhotel@gmail.com (Shared by both the local and hired hotel liaisons)
  - Merchandise Event Chair – scr20xxmerchandise@gmail.com
  - Webmaster – scr20xxwebmaster@gmail.com (This is the region's seminar webmaster)
  - Volunteers Chair – scr20xxvolunteers@gmail.com
  - Angel Coordinator – scr20xxangels@gmail.com
  - Teacher Showcase – scr20xxteachershowcase@gmail.com
  - Brochure – scr20xxbrochure@gmail.com (This is the local liaison with the seminar webmaster)
  - Treasurer – scr20xxtreasurer@gmail.com
  - Opportunity Knocks – scr20xxopknocks@gmail.com

## Appendix C – Seminar Task List

Click on the icon below for the Excel task list. Save to your desktop for updating.

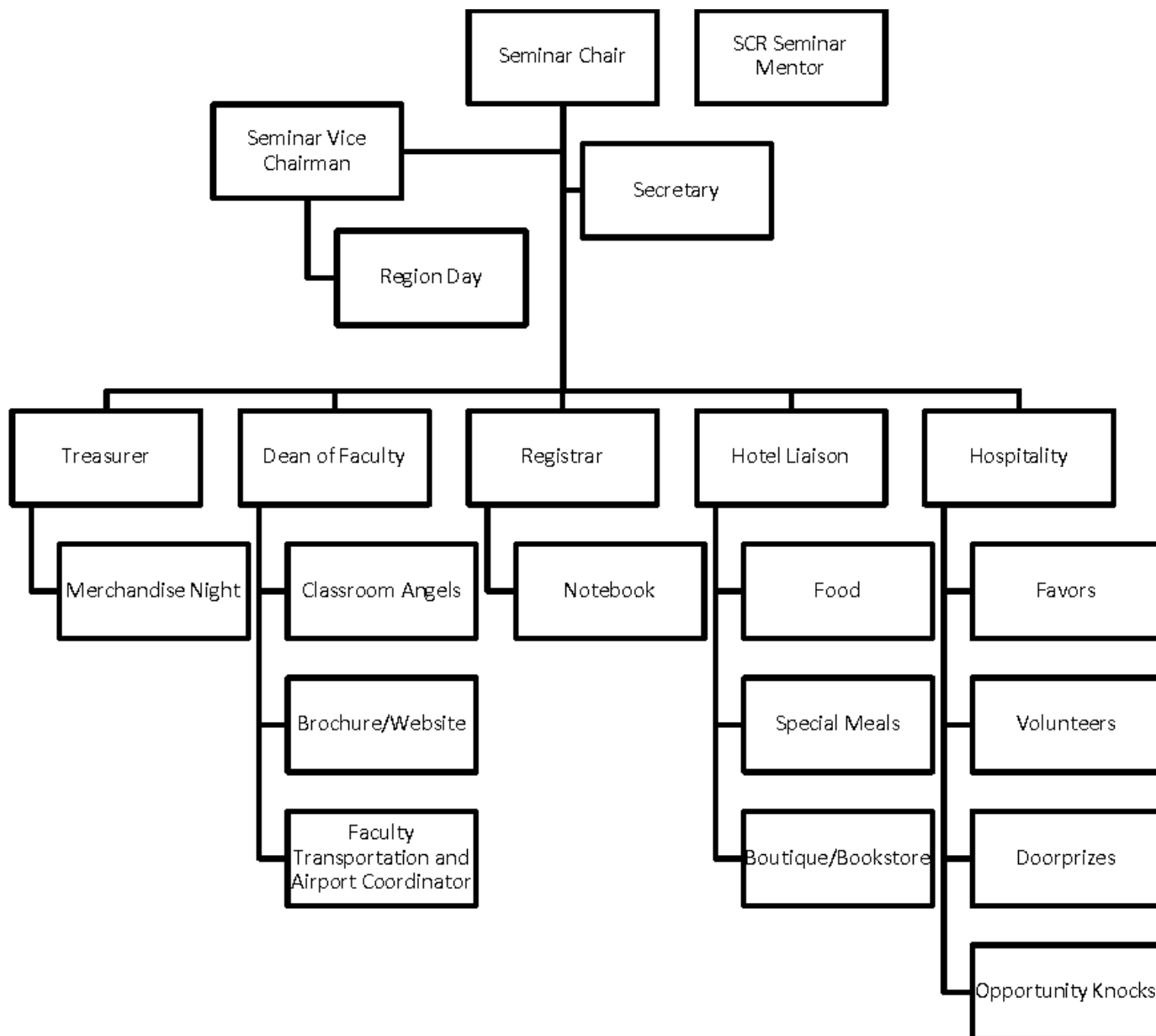
Please note this list is for Seminar 2014. Each chair should personalize the tasks for their seminar. A formula may be used to add the number of dates between Seminar 2014 and the current seminar. This will automatically update the dates for a closer approximation which may then be manually adjusted as necessary.



Combined task list  
for Seminar 2014.xls>



## Appendix D – Sample Organization Chart



## Appendix E – Sample Meal Scripts (Text)

### Additional recognition ideas:

- Family Units
  - Mother/daughter
  - Sisters
  - Grandmother/granddaughter
  - Other family relationships
- Age
  - Under 30
  - Under 40
  - Etc.

### Thursday Lunch

Music: <Song or songs to play>

Theme: <Lunch Theme>

### BEFORE LUNCH PROGRAM

#### Introductions:

- Welcome to <city>! For those of you who don't know me, my name is <name> and I'm the chairman of this seminar. I hope that you will have a wonderful time with us these next few days.
- Please take a silent moment to give thanks.
- **FAVOR REVIEW**
  - <tell about favors>
- If you do not want your favor or door prize, please bring them to the information desk to donate to <name of individual or organization>. She will donate to <name of organization>.
- **FIRST TIMERS RECOGNITION** Will all of our First timers please stand? You picked a wonderful seminar as your first one! Ladies, please note the first timers have a <recognition> on their nametag! Please be extra nice to them.
- **SEMINAR COMMITTEE RECOGNITION** Will the seminar committee members please stand? If you have any questions or concerns between now and Saturday, please direct them to a committee member. They are identified by <how to identify>.
- Finally, be thinking about when you joined EGA. You will need to know at the end of lunch.

### AFTER LUNCH PROGRAM

- I hope you were able to figure out when you joined EGA... Will all EGA members, please stand, or wave your napkin if you're unable to stand!
  - If you've been a member for more than 5 years remain standing.
  - If you've been a member for more than 10 years remain standing.
  - If you've been a member for more than 15 years remain standing.
  - If you've been a member for more than 20 years remain standing.
  - If you've been a member for more than 25 years remain standing.

- If you've been a member for more than 30 years remain standing.
- **Announcements**
  - Tonight is Merchandise Event 6:00 – 9:00 in this room. Merchants, the doors will be open at 3:30 PM for you to set up. If you have any questions, please see <name>.
  - Both the Bookstore and Boutique will be open from <time> today and tomorrow for your shopping pleasure. They will close after break at 10:30 AM on Saturday. So be sure to shop early, shop often, but shop before morning break on Saturday!
  - Don't forget to buy your opportunity knocks tickets. They are on sale in the bookstore/boutique area.
  - Lost and Found – Hospitality Desk.
  - Please leave the center pieces on the tables. You'll be seeing them again!
- **DOOR PRIZES** And now, the time you've all been waiting for! It's time for DOOR PRIZES!! Please stand or wave when your name is called and we'll bring your prize to you.

### **Friday Lunch**

**Music:** <Song or songs to play>

**Theme:** <Lunch Theme>

### **BEFORE LUNCH PROGRAM**

#### **Introductions:**

- Please take a silent moment to give thanks.
- <Description of theme. Any announcements about decorations, such as leave on table or feel free to take!>
- **FAVOR REVIEW**
  - <tell about favors>
- Just as a reminder, if you do not want your favor or door prize, please bring them to the information desk to donate to <name of individual or organization>. She will donate to <name of organization>.
- **FACULTY INTRODUCTIONS** I would like to introduce our wonderful faculty. Without their passion for embroidery, we wouldn't be here! Please stand as I call your name.
  - <list faculty. Ensure you know how to pronounce their names! Some are tricky!!!>
- **PRESIDENT RECOGNITION** I would now like to recognize the yeomen of your chapter. Will all the current and past Chapter Presidents please stand? Without these ladies (and gentlemen) EGA would not be the organization they are today.
- **<SAMPLE> SEMINAR PROJECT RECOGNITION:** Be thinking of all of the seminars you have attended. SCR, EGA National, ANG, etc. Think of all of the projects you have taken that are still in the closet and more importantly, those that you have actually finished! And by finished, I mean they are piece of jewelry, clothing, framed, finished into a pillow, ornament, standing figure, etc. NOT finished stitching and stuck in a drawer somewhere! You will need the finished count after lunch. And teachers, only projects where you've been a student counts!!
- **DOOR PRIZES** Remember, everyone will receive a door prize, but you must be present to win! Please stand or wave when your name is called and we'll bring your prize to you.

### **AFTER LUNCH PROGRAM**

- **<SAMPLE> SEMINAR PROJECT RECOGNITION:** I hope you were able to figure out the number of seminar pieces you have actually finished. If you're like me, you can count them on one hand! So without further ado, if you've finished at least one seminar piece, please stand!
  - 3 or more remain standing
  - 5 or more?
  - 10 or more?
  - 15 or more?
  - 20 or more?
  - 25 or more?
- **Announcements**
  - Tonight is the banquet. There will be a cash bar in *<location and time>*. The banquet will start at *<time>*.
  - There will be reserved tables at the banquet for the teachers, the region executive committee and *<Chapter name>* members.
  - The Bookstore and Boutique will be open until *<time>* today for your shopping pleasure. They will close after morning break at *<time>* tomorrow. So be sure to shop early, shop often, but shop until break on Saturday!
  - Don't forget to buy your opportunity knocks tickets. They are on sale in the bookstore/boutique area. **YOU MUST PUT YOUR TICKET IN THE BASKET BY 3:15 TODAY!!!** That is by afternoon break. The drawing will be at the banquet tonight.
  - Lost and Found – Hospitality Desk.
  - It has been recommended that you stop by the front desk and check your bill the day before you check out. Especially if you are sharing a room!
  - Please leave the center pieces on the tables. You'll be seeing them again!
  - *<Additional announcements>*
- **DOOR PRIZES:** Please stand or wave when your name is called and we'll bring your prize to you.

## ***Friday Banquet***

**Music:** *<Song or songs to play>*

**Theme:** *<Banquet Theme>*

**HEAD TABLE SEATING ORDER:** *(Left to right when facing table)* registrar, assistant seminar chair, National President, seminar chair **PODIUM** region director, faculty, hospitality, treasurer, hotel

## **BEFORE BANQUET PROGRAM**

**Introductions:**

- And now *<name>* will give the Invocation.

## **FAVOR REVIEW**

- *<tell about favors>*
- Just as a reminder, if you do not want your favor or door prize, please bring them to the information desk to donate to *<name of individual or organization>*. She will donate to *<name of organization>*.
- I would like to recognize our special guests. We are honored to have *<name>*, our National EGA President with us. And of course our region director, *<name>*.

- <Other thanks.>
- I would also like to thank the friends and family members of our committee. Without their support and understanding these last three years, we wouldn't be standing here today. I will introduce the rest of the head table after we eat!
- Finally, be thinking about how many seminars you have attended.

## **AFTER BANQUET PROGRAM**

- **SEMINAR COMMITTEE RECOGNITION** I would like to thank all of the members of the seminar committee. <Brief remarks about committee> We structured our committee with Team Leads, who are seated at the head table, and Team Members who are in the audience. Will you please stand as I call your name?
  - <name> - Region Day
  - <name> - Merchandise Event
  - <name> - Classroom angels
  - <name> - Faculty transportation and airport coordinator
  - <name> - Boutique
  - <name> - Bookstore
  - <name> - Favors
  - <name> - Volunteers
  - <name> - Opportunity knocks
  - All remaining <name> Chapter members please stand! While these ladies did not have a specific job on the organization chart, their assistance was immeasurable. They pitched in whenever and wherever their talents were needed.
- **I will now introduce the Team Leads. As I call your name, please stand.**
  - <name> – Registrar. Responsible for all things student and for running a zillion and one reports for me and the other committee chairs! I think she wore out her printer creating all of the registration packets. <Additional remarks>
  - <name> – Vice Chairman <Additional remarks>
  - <name> – Dean of Faculty. She is responsible for all things teacher, including the selection of the wonderful classes you are taking, overseeing the Angels, and website. <Additional remarks>
  - <name> – Hospitality. She is responsible for all things FUN! The phenomenal favors, can't live without volunteers, fabulous doorprizes, and opportunity knocks. <Additional remarks>
  - <name> – Treasurer. <name's> attention to detail is legendary; which is the exact quality one wants in a treasurer! She did a wonderful job keeping the books straight. She is also responsible for overseeing Merchandise Event. <Additional remarks>
  - <name> – Hotel. I think you can all agree that our facility is wonderful. We couldn't have put this seminar on without the guidance of Amanda and <name>. They are responsible for the food, special meals, meeting space and the Bookstore and Boutique. <Additional remarks>
  - **Finally, a special shout out to <name>** <Additional remarks>

**SEMINAR ATTENDANCE RECOGNITION** A tradition at SCR seminars is to recognize the number of seminars you've attended. So will everyone who has attended at least one SCR seminar, please stand?

- If you've attended more than 5, remain standing
- More than 10?
- More than 15?
- More than 20?
- More than 25?
- A special recognition to Mary Leach. She has been to each and every SCR seminar since 1981! This makes the *<number>* SCR seminar she has attended!
- *<Seminar chair>* introduces the RD *<name>*
- RD Remarks
- Introduction of Region Board by RD
- RD introduces the EGA National President

**Program:**

- *<Program>*
- **Heart and Hand Award** *<Name>*
- **Logo contest award** *<Name>*
- **Drawing for Seminar 20xx in** *<City>* - *<Name>*
- **Opportunity Knocks Baskets** If you are one of the lucky winners stop by the Op Knocks area to pick up your basket!

**Announcements**

- The Bookstore and Boutique will close at *<XX:XX>* tomorrow. So be sure to shop early, shop often, but shop until break on Saturday!
- Lost and Found – Hospitality Desk.
- Registration for SCR Seminar 20xx in *<City>* will be in *<Location and time>*
- *<Additional announcements>*

**Saturday Lunch**

**Music: Supplied by** *<next seminar>*

**Theme:** *<Next Seminar>*

**Introductions:** Kitchen and wait staff

**BEFORE LUNCH PROGRAM**

- **Please take a silent moment to give thanks.**
- Thank you to the *<City>* Seminar 20xx for the welcoming music! I hope you've signed up for "*<seminar name>*" it should prove to be a wonderful time!
- **DOOR PRIZES:** Please stand or wave when your name is called and we'll bring your prize to you.

**AFTER LUNCH PROGRAM**

- **ANNOUNCEMENTS:** There are several ladies who were unable to attend. If you are friends with one of the following people and would like to deliver their kits and favors to them, please stop by the office after lunch today.
  - <names>
- **Lost and found**
- **Recognize Hotel Staff:** I think everyone will agree that the hotel and wait staff have been wonderful!
- **DOOR PRIZES:** Please stand or wave when your name is called and we'll bring your prize to you.
- **<Next seminar>**

## Appendix F – Information to Open a Seminar Bank Account

Below is information from EGA National on how to open a seminar bank account. If there are additional questions, the host unit should contact the current EGA National Treasurer.

### **Embroiderers' Guild of America Guide to Regions/Chapters banking**

The type of account that a region or chapter should open is one for an **“Unincorporated Association or Civic group”**. This is Wells Fargo terminology but other banks should have similar terminology.

**Regions and chapters are not incorporated and each has its own EIN. EGA National is incorporated but it is not the regions and chapters “parent company”. Regions and Chapters are “subordinate organizations” to EGA National for tax purposes only. Regions and chapters do not need authorization from National to open an account. The regions and chapters are not National “doing business as” the region or chapter. National incorporation documents are not needed for an account.**

**We are not the Girl Scouts!** EGA understands that some bankers have compared EGA to that organization for banking purposes. Girl Scout troops need authorization from Regional Councils to open bank accounts and use the Council's EIN. EGA does not operate that way.

To open or change signers on an account, a chapter or region should have:

Board minutes printed on letterhead (if the chapter or region does not have letterhead, create one by using the chapter or region logo with a current officer's address) that contain the following motions:

1. Minutes or motion documenting the election of the officers who will be signers.
2. Motion authorizing an individual (usually the treasurer) to open or make changes to an account (have the account number).
3. Motion listing the individuals who will be the authorized signers. Generally, all authorized signers need to be at the bank at the same time. If this is not possible (usually in the case of a Region), the bank should have procedures to work with you. For example, an authorized signer can be at one bank branch at the same time another authorized signer is at another branch with the two bankers communicating. When I added Pam Coller to the 2019 Seminar bank account at Wells Fargo, I was in a branch in Colorado and she was in a branch in California. Or, if the Region is having a retreat or Seminar, signers can be added providing they are at a branch with a current signer and the current signer has a copy of the motion listing the authorized signers.
4. (For Chase) Motions appointing an individual (again usually the treasurer – this person will need to go to the bank when the changes are made) to be “Acting secretary for banking purposes”

The Region/Chapter EIN.

Call the bank ahead of time and ask to speak with a Business banker to find out what else may be needed to open/make changes to an account.



If the bank needs proof that the Region/Chapter is a 501(c)(3), the National Treasurer can do a letter confirming that the Region/Chapter is a “subordinate chapter” and covered by the National Group Exemption letter. Below is information from Seminar 2023 (HEG) and their experiences in opening a bank account. It may prove helpful for other host units, especially those in Texas.

We now have a small business checking account at a regional bank. Once I told them we were an “unincorporated nonprofit association” it went much more smoothly. This regional bank (Moody National Bank) charges no service fees to non-profits and requires no minimum balance. All the national banks charge service fees \$12-\$15/month and require a high minimum balance. [Note, it is highly recommended that the host unit attempt to find a bank/credit union that does not charge fees.]

We did have to name the account the exact name as listed on our IRS EIN letter. But we could incorporate the seminar name as the second line. So, seminar participants can still make their checks payable to SCR Seminar 2023.

Embroiderers’ Guild of America Inc Houston Chapter  
SCR Seminar 2023

The documents the bank required were:

- Chapter’s IRS EIN letter
- IRS Group Determination Letter for EGA
- Letter in Good Standing for our chapter. The bank accepted it in place of a Chapter Charter which we don’t have anymore. Cynthia Welch provided it for us.
- Chapter board meeting minutes on chapter letterhead stating the board gave permission to open a checking account at Moody National Bank for the seminar. Also, the names of authorized signors.

That’s it! They did not require us to do a DBA of any kind.

As to the question of why isn’t HEG registered with the state of Texas? We don’t have to be. As an Unincorporated Nonprofit Association, a chapter may but does not have to be registered. See the FAQ for Unincorporated Nonprofit Associations on the Texas Secretary of State website.

<https://www.sos.texas.gov/corp/nonprofitfaq.shtml>

And on the question of does our chapter have to apply for Texas franchise and sales tax exemption? Again, the answer is no. It is spelled out in the Texas Exemption Verification Letter for EGA found on the Texas Secretary of State website.

<https://comptroller.texas.gov/taxes/exempt/verification-letter.php?id=11319145774>

*“Subordinates covered by this parent organization's group exemption, or entities covered by this category of exemption, may issue valid exemption certificates and although not required, may [apply](#) to be listed separately on our records.”*

Our chapter may but does not need to apply for a Texas Franchise and Sales Tax exemption.

I believe, EGA’s and SCR’s Texas exemption was applied for and granted in preparation for the national seminar in San Antonio a few years ago. Here is SCR’s exemption verification letter.

<https://comptroller.texas.gov/taxes/exempt/verification-letter.php?id=17518601095>

Below is information originally captured for opening a bank account. It will be left here for reference.

The State of Kentucky website for corporations has a search tool to access any EGA registration documents needed by your state or bank when you are opening a bank account for a region seminar.

**<https://web.sos.ky.gov/ftsearch>**

Search by name: "embroiderers"

OR number 0272617

Choose the "Active-Good" corporation

This will bring up the current EGA information –

Scroll down to the "Images Available Online"

Depending on your state and bank – these documents may be needed. They are in .pdf format and can be printed page by page.

- Application for Certificate of Authority – date 12/12/1990
- Articles of Merger – date 2/16/1993
- Registered Agent Name Change – date 5/17/2011

Some documents are titled differently than the phrase or name your bank or state is requesting.

As of 2015, Texas banks are requiring seminars to apply for a DBA (Doing Business As) certification from the state before they will approve a bank account. Each state and bank will have different requirements.

Attached are various documents your bank may require. If they are asking for additional information, please contact EGA personnel at headquarters.

The next section is for Texas Seminars only:

Search for the latest Texas 503 Assumed name (DBA) certificate application by doing an internet search for "Texas Form 503". Contact the Treasurer of the last Texas Seminar to obtain an example of how they filled out the form.

## Appendix G – Setting up a Charity PayPal account

Business support phone number 888-215-5506

EGA is a registered 501c3 company, Federal ID #75-1860109, SCR and all chapters are under the national umbrella.

This is how SCR Seminar 2024 established a confirmed charity account which qualified for the low processing rate of 1.9% + \$0.49 per transaction. (May 2023)

Seminar 2024 opened a business account with the name South Central Region, EGA, Seminar 2024. Business Type is Non-Profit, Charitable Service Organization and they used the seminar treasurer email address.

PayPal requires information from a real person and only accepts the personal information of an officer, in this case, treasurer. The treasurer entered her social security number, home address, and personal cell phone. Then set the password.

The next step is the Charity Verification process when prompted by an email. You will be required to upload a bank statement and the Federal ID #.

The review process only took 2 days. The treasurer received an email “It’s official: You’re now a PayPal confirmed charity.”

The treasurer was assigned a personal case manager when PayPal was told the seminar would be processing \$50k - \$75k in payments over the course of the 18 months.

## Appendix H – Final Report Template

Use the below template to prepare your final report.

Do not include teachers in your participant numbers. Only paying registrants should be reported as participants. Non-participants should be broken out in a separate column. However, teachers should be included in the number of attendees.

### ***Summary or Letter from Chair***

<One to two paragraph summary of Seminar. Include when, where Seminar was held and any specific Seminar goals. Alternatively, a letter from the chair summarizing important aspects of Seminar may be written.>

Include high level final figures here

### ***Structure***

<A summarization of the Seminar structure. You may include such things as the committee structure, how meetings were held, communication methods, task lists or other means of staying on track, etc.>

### ***Teams***

<Have a section for each team lead, or “big box” from the organization chart. Have a subsection for each team member or “little box” from the organization chart under each team lead.>

### **Facts**

- <Create a Facts section that details the salient information for that team lead. Recommend a bulleted list.>

### **Hindsight, Tips and Tricks**

- <Create a list of things you wish you had done differently, things that went well and recommendations for future seminars.>

## Appendix I – Faculty Information Forms

Use these forms to gather teacher classroom and transportation information.

<Seminar Name>  
<Seminar Date>  
<Seminar Location>

### Faculty Hotel & Transfer Information

Please complete the information below so that your hotel reservation can be confirmed and arrival/departure transfers can be arranged.

Today's Date: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Cell Phone # you will have with you: \_\_\_\_\_

### Hotel Information

Date of Check-In: \_\_\_\_\_

Date of Check-Out: \_\_\_\_\_

Name of person with whom you will share a room, if applicable: \_\_\_\_\_

For what dates: \_\_\_\_\_

Do you have any specific requirements or requests for your hotel guestroom? Please explain.

---

---

---

### Transportation Information

Are you driving to Seminar? Yes No

If driving, what is your estimated day/time of arrival?

---

### Hotel Transfer Information (Skip this section if driving.)

Arrival Airline & Flight Number:

Departing from what city? \_\_\_\_\_ Departure Time:

Arriving to which airport? \_\_\_\_\_ Arrival Time:

Departure Airline & Flight Number:

Departing from which airport? \_\_\_\_\_ Departure Time:

Arriving to what city?

How much luggage will you have?

Is there any other information you wish to share about your travel needs? Please explain.

<Seminar Name>  
<Seminar Date>  
<Seminar Location>

### Classroom Set-Up Request

Please complete **one** request form for **each class**

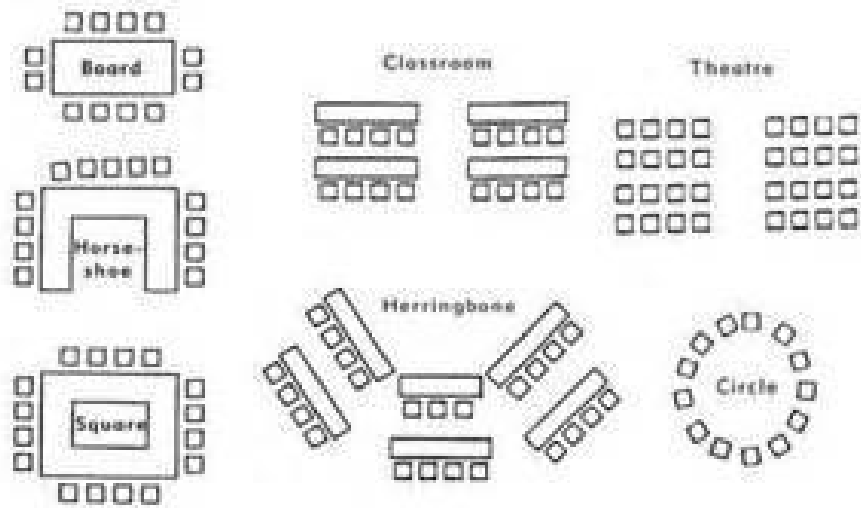
Instructor:

Name of Class:

Date of Class:

Number of Students:

Room Configuration Requested – Please mark one of the configurations below.  
Number of seats shown is not valid. Seats shown are only to indicate placement.



Additional Tables Required (Note - *Head Table for Instructor and Materials Tables will be Set in All Rooms*):

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---

White Board with Markers Required – YES NO (please circle one)

Audio Visual or Other Equipment Required or Other Special Requirements:

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## Appendix J – All “clickable” supporting documents

All supporting documents are below. The text of each document is found in the applicable section of the guidelines.

 1 Opportunity Knocks Notice 20091	 2 SCR_Seminar_Resum	 3 Texas sales tax information.docx	 4 SAMPLE HOTEL CONTRACT.docx	 5 Proposal Submission Guidelin	 6 ICNA Standard Proposal Summary S
 7 SCR Seminar Proposal Summary S	 8 Mini Workshop Contract EGA.doc	 9 SCR Generic Teacher Expense Rep	 10 SCR Budget Template 200917.xls	 11 Seminar Pricing worksheet 200917.xls	 12 Combined Task List for Seminar 2014
 13 Org Chart Generic SCR v1.0.doc	 14 EGA National IRS Determination Letter	 15 EGA National Article of Incorporat	 16 EGA Corporate Documents.doc	 17 suggested final report for seminars 2	 18 Seminar Htl & Transport Request Fc
 19 Seminar Classroom Set-Up Re					