

Administration and Communication Flow in Various Scenarios

Situation: A facilitator commits to hold an event (conference, group retreat, workshop) at Heartwood.

- Planning:
 - **Admin and Marketing Coordinator (MC)** receives the commitment and negotiates terms. Sends contract, receives deposit.
 - MC posts planned event on Heartwood Calendar online and sends announcement via text to all staff.
 - MC sends Event Planning Sheet to Event Coordinator, Facilities Manager and Kitchen Manager. Includes:
 - Name of event and brief description (conference, workshop, etc.)
 - Instructor or organization
 - Dates
 - Expected number of participants
 - Meeting venue needs (seating arrangement, AV & other equipment, other)
- Preparation:
 - MC and Event Coordinator post info about the event on Heartwood’s website with online registration mechanisms (deadline date, preferences re lodging, expected arrival time, ground transportation needs, handicapped access needs, foods, allergies, fees, payment processing)
 - As registrations come in via the website, email, phone, mail, MC receives and processes for financial and list management. MC sends out confirmation packet to each registered guest via email including receipt, invoice for any remaining balance to be paid on arrival, directions and map to Heartwood, things to bring/not bring (noting no smoking, drugs, alcohol, etc.)
 - MC maintains event’s registered guests log on a “cloud file” accessible and maintained by all staff.
 - Kitchen manager uses it to plan for supplies and shopping.
 - Facilities Manager plans schedule for preparing lodgings (including any special needs); coordinates with Housekeeping.
 - Event Coordinator prepares welcome kits, which include event schedule including meals, Heartwood staff names and positions, community protocols and agreements (e.g. no smoking or pets).
 - Volunteer Coordinator is kept informed of expected needs for assistance in any department related to the event.
 - Community Facilitator organizes any appropriate and requested social events which will include event participants, retreatants and residents. Provides information to Event Coordinator for inclusion in the event’s scheduling, and to Facilities and Kitchen Managers for any logistics needed in their areas (e.g. firewood, popcorn, beverages, etc.)

- Greeting:
 - **Event Coordinator** welcomes the Instructor and/or Facilitator, and introduces them to the Marketing Director who completes any needed paperwork. MC provides them with a current list of registered guests.
 - **Event Coordinator** and a volunteer greet guests as they arrive, hand out the welcome kits, and direct them to the registration desk to complete any needed payments, etc.
 - The **volunteer** guides them to their lodgings, orienting them to the facilities (e.g. café, meeting room, etc.) in the process, and reminds them of the safety regulations (e.g. no open flames or smoking) and protocols for self-care of their lodgings at checkout.
 - **Event Coordinator** and a volunteer assistant sets up refreshments in the café for guests to enjoy as they arrive and prior to the first meal.
 - **Event Coordinator** gives Instructor and/or Facilitator of the event a tour of the grounds for orientation, reviews the schedule of events, and shows them their meeting space. Reviews preparations, needed equipment and supplies, and makes any additional arrangements needed.
 - During the event's proceedings, **Event Coordinator** monitors the meeting's environment for quiet, supplies and cleanliness. Housekeeping maintains group facilities, refreshment supplies, and any needed commodities such as toilet paper.
- Departures:
 - **Facilities Manager** coordinates with **Volunteer Coordinator** to have volunteers work with departing guests, assisting guests in any last minute tasks to complete tasks prior to leaving, getting luggage to cars, transporting to airport, etc.
 - **Admin Manager** delivers final invoice to Instructor or Facilitator and collects payment (ALT: Provides final accounting to Facilitator re revenue received, Heartwood's service charges, and net due either way.)
 - **Event Coordinator** distributes a brief feedback form to each guest (separate one to the Instructor and/or Facilitator) to get QC feedback on their experience at Heartwood. Collects, compiles, and delivers report on the results to Senior Staff member, who then shares with entire staff for discussion of potential improvements.
 - **Senior Staff** meets with Instructor before they leave to express thanks, discuss future needs, cement the relationship further.
- Quiet times:
 - **Admin & Marketing Coordinator** focuses on refreshing website, developing and implementing next stage of marketing plan; produces a financial report for Senior Management on a recently completed event showing total revenues, expenses, and outcome. Recommends any procedural changes.
 - **Event Coordinator** updates event schedule, revises service plan based on prior experience and feedback.
 - **Facilities Manager** conducts repairs and periodic maintenance, including full-facility extermination treatments.

- **Community Facilitator** organizes a feedback discussion with staff and resident volunteers to de-brief experiences from the recently completed event. Takes notes on any suggestions for improvement of procedures and practices, and prepares a report to be delivered to Senior Staff.
- **Kitchen Manager** cleans out any leftovers from recent event, does thorough cleaning and sanitizing of kitchen equipment and café with volunteers' help, refreshes staples and supplies as needed.
- **Housekeeper** works with **Facilities Manager** to identify and conduct any needed maintenance or repairs, replace any supplies and linen inventory requiring it.