

# **RMGA**

# **Board**

# **&**

# **Committee**

# **Guidelines**

**September, 2015**

Note: RMGA By-laws and Policies and Procedures take precedence over suggestions and guidelines provided here.

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## Board Member Guidelines

The By-Laws and Articles of Incorporation outline the responsibilities and expectations of each of the members of the RMGA Board of Directors. Beyond that, there are suggestions for ways to make those expectations happen.

### ***President***

#### **Activities:**

- perform duties as specified in the By-Laws, consistent with RMGA Articles of Incorporation as well as Policies and Procedures.
- conduct Board meetings
- create ad hoc committees to address specific issues or tasks; the president is automatically a member of all committees
- ensure tasks are completed on the appropriate timetable
- follow timetable and tasks to be completed during year; adjust/revise as needed
  - January: Board approves budget for this year
  - January: appoint Financial Review committee to meet between January Member meeting and February Board meeting
  - February, March, April: work with ad hoc committees to finish tasks before tour season starts, if possible
  - August: see that Nominating Committee is formed and active
  - September: make Board decision on fees and Early Bird discount
  - invite Board members and Committee chairs to revise this document to reflect experience
  - December through January 31: Early bird and renewal membership period, if approved by Board of Directors
  - November/December: appoint committee chairs for next year; Director at Large is automatically a member of the Nominating Committee; Financial Review Committee members are appointed by the President subject to the approval of the Board
  - December: receive proposed budget items from committees
  - December: monitor Liability Insurance project
  - January: approve Programs and Education plans, if presented

## ***Vice President***

### **Activities:**

- perform duties as specified in the By-Laws, consistent with RMGA Articles of Incorporation as well as Policies and Procedures.
- conduct Board meetings in absence of President
- provide activities as requested by President
- act as President in the absence of the President or in the event of the inability or refusal of the President to act, perform all duties of the President, and when so acting, have all the powers of and be subject to all the restrictions upon the President.
- in general perform such other duties as may be prescribed by the Board of Directors from time to time

## ***Secretary***

### **Activities:**

- perform duties as specified in the By-Laws, consistent with RMGA Articles of Incorporation as well as Policies and Procedures.
- keep the minutes of the Member and Board meetings;
- give or see that all Notices are duly given in accordance with the provisions of these Bylaws or as required by law
- be custodian of the corporate records and of the Seal of the Corporation;
- keep or cause to be kept current Member mailing addresses
- keep or cause to be kept attendance records of the Membership
- conduct the general correspondence of RMGA
- in general perform all duties incident to the office of the Secretary and such other duties as from time to time may be delegated or assigned to him or her by the President or by the Board of Directors.

## ***Treasurer***

### **Activities:**

- perform duties as specified in the By-Laws, consistent with RMGA Articles of Incorporation as well as Policies and Procedures. Specifically, (a) have charge and custody of and be responsible for all funds and securities of the Corporation; (b) receive and give receipts for moneys due and payable to the Corporation from any source

- whatsoever, and deposit all such moneys in the name of the Corporation in such banks, trust companies, or other depositories as shall be selected in accordance with the provisions of Article V of these Bylaws; (c) disburse funds only upon the authorization of the Board of Directors or the Members; (d) submit written reports at each Regular Meeting of the Board of Directors and submit books and records for review as soon as possible after January 1 of each year; (e) file any tax or other reporting forms required; (f) oversee registration at Meetings and collection of Meeting fees; and (g) perform such other duties as from time to time may be assigned by the President or by the Board of Directors.
- fulfill requirements of the annual calendar of activities
    - monthly: attend Board meetings
    - monthly: prepare report of income/expense for month and year to date, compared to budget
    - beginning of term: become a signer on the association bank account, with the president
    - beginning of term: register self as Treasurer/point of contact with all professional affiliations
    - monthly: attend to accounts payable and receivable
    - monthly: keep bank account in balance with bank statement each month
    - monthly: use the software approved by the Board of Directors as set up for RMGA to balance the bank account and provide information for monthly reports
    - monthly: monitor income and expenses in relation to the budget, and inform the Board of potential problems
    - December: develop proposed budget; solicit proposals in December and prepare budget for January Board meeting
    - January: send IRS e-postcard in January to keep tax exempt status
    - monthly: reimburse members for approved expenses, whose receipts must be accompanied with the appropriate form for the records;
    - monthly: accept and deposit checks made out to RMGA from whoever collected the checks; the checks must be accompanied by the appropriate form providing a list of payors and amounts, which list is filed with the Treasurer's paperwork
    - November: manage liability insurance program: send out e-mail announcement to members in November for next year's coverage; send in payment and list of names to NFTGA by date required so NFTGA can meet its application deadline;

- January: perform year end close out and prepare to turn information over to Financial Review Committee at the January membership meeting
- pay association membership dues in timely fashion: Visit Denver, Tour Colorado, NFTGA, WFTGA, Colorado Springs Convention Bureau
- May: pay Rick's Cheap Domain/RMGA website; paid on a two-year contract; 480.624.2500; [support@secureserver.net](mailto:support@secureserver.net) as needed: with each change of Treasurer, inform Rick's Cheap Domain of outgoing and incoming Treasurer
- May: Pay Colorado Secretary of State annual renewal which verifies the RMGA agent.
- February: pay WFTGA membership dues, due February 28 for yearly membership; payment made online through MB Moneybookers.com. This is an international money transfer (do Euro conversion to US dollars for current exchange rate)
- December: pay Tour Colorado dues by December 31, for January 1 calendar year membership;

### ***Director at Large***

#### **Activities:**

- perform duties as specified in the By-Laws, consistent with RMGA Articles of Incorporation as well as Policies and Procedures.
- perform such special duties as requested by the President or Board
- organize and participate in Nominating Committee activities
- perform such other duties as from time to time may be assigned by the President or by the Board of Directors.
- maintain this Best Practices manual

## General Guidelines for RMGA Committee Chairs

The duties and function of each Standing Committee are defined in the Bylaws. The President and/or the Board of Directors specify assigned duties and function to any ad hoc committee which may be appointed. The Board of Directors may specify additional goals for any committee. Each committee chairperson is expected to be familiar with RMGA Bylaws and Policies. Any deviation from the Bylaws and/or Policies requires approval in advance from the Board of Directors. The Board reserves the right to manage the activities of all committees.

The focus for each committee is the fulfillment of the assigned duties and functions. These Committee Guidelines are simply a record of how past committees have successfully accomplished these assignments. If a committee wishes to use different methods to accomplish its duties and function, it is free to do so at its own discretion. Creativity is welcomed. However, all committee methods and actions must be consistent with RMGA Bylaws, Policies, and the current year's budget.

The Board is responsible for making decisions. It is the responsibility of the committee to advise the Board and to make recommendations. That is, the committee proposes, and the Board decides. Only a Board member or its designated agent signs contracts, and that only following a Board authorization.

Within these overall guidelines, there are expectations on the part of the Board that Committee chairpersons will:

- perform duties as specified in the By-Laws and Policies, consistent with the Articles of Incorporation
- recruit their own committee members;
- provide recommendations to the Board as requested or as situations require
- carry out decisions made by the Board without exceeding the approved budget
- propose annually a committee budget of income and expenses, and provide to the Board when requested;
- after the Board approves the budget, incur as a committee those expenditures as are within the scope of responsibilities and limitations of the approved budget without further Board action. Any expenditure exceeding net budgeted expense (difference between income and expense) requires prior approval by the Board.
- provide the Board with a monthly written report on committee activities

- attend such Board meetings as desired, and attempt to attend a particular Board meeting if requested
- provide the President with current and on-going information on committee activity, progress and issues, in order to avoid surprises and the need for emergency decision-making; the recommended method is to cc the President on all committee-related emails
- avoid any activities which constrain the decision-making responsibility of the Board
- understand that all contributions of time and effort to benefit RMGA are done without expectation of any pay or gratuities, though expenses approved by the Board will be reimbursed, with appropriate receipt(s) provided (see RMGA Articles of Incorporation);
- revise these Committee Guidelines as appropriate

## ***Membership Committee***

### **Activities:**

- perform duties as specified in the By-Laws, consistent with RMGA Articles of Incorporation as well as Policies and Procedures.
- The Membership Chairperson is responsible for recruiting members of the Committee, and is advised to actively develop his/her successor to minimize transition complexities

There are two basic tasks that the Membership Committee handles, and they do not need to be handled by the same person.

- create and maintain accurate Membership records, and supply current membership information to the newsletter editor and the website manager.
- expand current membership, by following up on guest visitors at prior meetings, encouraging members to bring guests, and seeking out opportunities to include more guests in RMGA activities.

### **Recurring Tasks**

- receive applications and dues for new and renewal memberships, evaluate the applications, and make recommendations to the Board of Directors as to the appropriate membership category for prospective and renewing Members.
- make appropriate membership application forms available to all Members and prospective Members;
- keep accurate records of Members;



- notify the Secretary, the Email Distribution Committee, and the Newsletter Editor of all additions, deletions, and changes in Members; and
- transfer all dues collected to the Treasurer.
- if faxing information to Larry Foos, use 303.979-7594 Prefer email LBFOOS@comcast.net
- become familiar with the RMGA Articles of Incorporation, the By-Laws, and the Policies. The most current versions are found in the MEMBERS ONLY section of the website.
- write monthly article for the Guide Lines newsletter, welcoming new members and guests. Due by the 20<sup>th</sup> of the month to newsletter editor. The file should be saved as .doc.
- prepare report for monthly Board of Directors' meeting.
- attend Board of Directors' meeting as appropriate.
- send meeting invitation at the beginning of each month to those who have expressed an interest in RMGA. The description of the meeting and program should be sent to Membership at the same time it is sent to the newsletter editor. If details are not received, contact Program Chairman. Target date is around the 1<sup>st</sup> of the month.
- prepare monthly meeting sign-in sheet of all current members with space for guests.
- determine who will take attendance, the Membership committee or the Secretary.
- if requested by the Program committee, collect reservations and fees for the current or a future meeting.
- send names and contact information of guests to newsletter editor within a week after the monthly meeting.
- work with the RMGA Treasurer to keep track of repeat guests and collect appropriate visitor fee.
- compile a roster of current members in PDF or Word format for webmaster with each change in membership.
- compile a roster (usually as an excel spreadsheet) of current members for the newsletter editor for distribution as requested. Verify the format for the roster.
- no later than December 1, prepare membership application(s) and procedures for upcoming year, including Early Bird Discount, if Board approves.
- prepare temporary name tags for members and guests and have them available at all monthly meetings

- submit repayment request form to treasurer for reimbursement of funds spent on behalf of RMGA; include receipts
- order replacement name tags as needed. Members are to reimburse RMGA for the cost of replacement tags.
- format for the name tag:

<b>Membership Category</b>	<b>RMGA Logo</b>	<b>Primary Line</b>	<b>Secondary Line</b>
Professional	Yes	Member Name	Blank
Associate	Yes	Member Name	Blank
Business	Yes	Member Name	Blank
Friend	Yes	Member Name	Friend
Student	Yes	Member Name	Student
Retired	Yes	Member Name	Retired

- order tags from:  
 Alpine Trophies, Inc  
 6905 S. Broadway Suite 109  
 Littleton, CO 80122  
 303-798-2511  
 email: info@alpinetrophies.com

Specify magnetic or pin backing, the RMGA logo, the correct spelling of the name, and if the member is certified or not. Call first and then e-mail the information to help eliminate errors. The tags are paid for when they are picked-up. Send money collected for tags to Treasurer.

For business members, the company name is not included on the name tag.

**Membership renewal**

- clarify next year’s dues amount with Board. By the end of September, the Board determines the annual dues for the upcoming year, whether or not an early bird discount will be granted, effective dates if it is, and any other changes to the membership process.
- distribute renewal application to Membership, at the December and January meetings, via e-mail prior to the December meeting, in January prior to the cut-off date, and by posting it on the website for downloading.

- receive applications. Verify that all information is provided and application is signed.
- update membership spreadsheet with renewing members
- transfer all dues and the completed money collected form to the Treasurer. Note: Credit Cards are not accepted.
- upon completion of renewal period, report changes to newsletter Editor, Webmaster, Secretary, Email Coordinator and to the person responsible for liability insurance.
- provide committee chairs with the list of those who have expressed an interest in working on their committees.
- compile a roster of current members in PDF or Word format for webmaster.
- compile a roster of then current Members and distribute to newsletter editor and webmaster, after final registration date has passed.

### **New Members**

- make sure new member applications and category and policy information are available at each monthly meeting and on the website. Distribute new member applications as requested.
- assist in recruiting new members. Recruitment may be more effective if done by a dedicated Membership recruitment volunteer versus the Membership chairperson.
- determine amount of membership fees based on the procedures outlined in the RMGA Policy document.
- upon receipt of completed application and check, submit applicant's name and qualifications to Board of Directors at the next meeting. In the event a decision on Membership level is needed prior to the next Board meeting, the vote on the approval of the new member can be done electronically. The request for a vote is made by the President.
- upon approval of a new member:
  - notify new Members that their application has been approved.
  - send profile template to new Professional, Associate, and Business Members asking them to complete the form so that their profile can be added to the website. The Student, Friend, and Retired membership levels do not include profile listings on the website. Follow procedures as outlined by the Webmaster.
  - send the instructions for accessing the "MEMBERS ONLY" section of the website. Make sure to provide the most current user name and password information.
  - send contact information to (with CC to the President):

- person responsible for the liability insurance
- newsletter Editor
- Secretary
- Email Coordinator
- record new Member in Membership spreadsheet
- send check and completed money collected form to Treasurer. Note: Credit Cards are not accepted.
- compile a roster of current Members in PDF or Word format for Webmaster.
- notify the appropriate committee chairperson if the new Member has indicated an interest in working on their committee.
- introduce new Members in the monthly article for newsletter. Their contact information should be included.
- new Members are entitled to one name tag. Business members are entitled to one name tag for the Primary Representative and one for the Alternative Representative. The company name is not imprinted on the name tag.
- students must present proof of their student status – copy of student ID or a letter from the school. Students are entitled to a name tag at their own expense.
- Format for the name tag

<b>Membership Category</b>	<b>RMGA Logo</b>	<b>Primary Line</b>	<b>Secondary Line</b>
Professional	Yes	Member Name	Blank
Associate	Yes	Member Name	Blank
Business	Yes	Member Name	Blank
Friend	Yes	Member Name	Friend
Student	Yes	Member Name	Student
Retired	Yes	Member Name	Retired

- Order Name Tag from:  
Alpine Trophies, Inc  
6905 S. Broadway Suite 109  
Littleton, CO 80122  
303-798-2511

email: [info@alpinetrophies.com](mailto:info@alpinetrophies.com)

- Specify if tag is to have a magnetic or pin backing, the RMGA logo, and the correct spelling of the name. Call first and then e-mail the information to help eliminate errors. The tags are paid for when they are picked-up.
- Specify if tag is to have a magnetic or pin backing, the RMGA logo, and the correct spelling of the name. For business members, the company name is not included on the name tag.

## ***Programs Committee***

### **Activities:**

- perform duties as specified in the By-Laws, consistent with RMGA Articles of Incorporation as well as Policies and Procedures.
- plan and carry out the program for the monthly Regular Meetings of the Members, including, but not limited to, selection of sites, securing and introducing speakers, and sending appropriate notes of appreciation to those who have presented or sponsored programs.
- take responsibility for recruiting members of the Committee, and is advised to actively develop his/her successor to minimize transition complexities.
- communicate the proposed program schedule to the Board for their approval. The Board has the authority to disapprove and make changes.
- submit a calendar of confirmed recommended programs for the next year to the Board at the December meeting.
- do not release the Program Schedule to the newsletter or website until it has Board approval.
- attend Board meetings when there is a recommendation or development of substance to report. Submit a brief written report to the Board each month; two or three sentences are often all it takes.
- make a budget request with expenses in excess of income by \$300, to give the Committee space to plan quality events. Place this in the budget, even if you do not intend to use it. Once the Board approves the Budget, then the committee has the discretion to use the Budgeted amount as needed without seeking Board approval.

### **Program Planning Checklist:**

- Six weeks prior to the meeting contact the person(s) with whom you

have made the initial arrangements:

- confirm the date
- confirm arrangements for having light refreshments. In most cases these will be brought to the meeting by the Hospitality Chairman, sometimes refreshments may be provided by the venue.
- the Program Chair, Hospitality Chair, and Membership Chair will need access to the meeting room 30 minutes prior to the time members arrive.
- room needs to have seating for 30 people.
- request two (perhaps three) tables for refreshments, registration / Membership, and head table if needed.
- allow 30 - 45 minutes for the program, which includes time for questions. Tours sometimes require a little more time.
- clarify who sets up and takes down tables and equipment.
- get the name or number or location of the meeting room. Be specific about where members are to gather when they arrive.
- clarify parking arrangements.
- obtain the mailing addresses for all program participants.

**One month prior:**

- notify the Hospitality Chair and the Membership Chair about the location and the time they will have access to the room. Let them know you have arranged a table for each. If the Hospitality Chair does not need to bring refreshments, tell him/her.
- discuss with the president the flow of activity for the evening. Is the program or the meeting first? Who will call the group to order and get things started?
- for locations other than downtown Denver, drive to the site and confirm very specific directions. Even if you have GPS or MapQuest directions, it is a good idea to confirm the accuracy. Check out the parking situation.

**By the 15<sup>th</sup> of the month prior (deadline is actually the 20<sup>th</sup> but aim for the 15<sup>th</sup>):**

- email written information to the Newsletter Editor. Use the Meeting Announcement template for consistency. Insert your name and cell phone number for the Meeting Night Contact. In addition to this announcement, write a separate news item describing the program/speaker and why it is of interest. Write a separate short item about a restaurant opportunity close to the meeting site.

- if gratuities are going to be appropriate for guides, hotel servers, etc., include that information in the Meeting Announcement. Suggest an amount or range of amounts for the gratuity.
- provide the Newsletter Editor with mailing addresses for all program participants. The Editor will send them a copy of this newsletter and also the follow-up newsletter after the meeting.
- email the Meeting Announcement and supporting information you wrote for the newsletter to the Membership Chair and Website Coordinator. The Membership Chair often has potential members who need to receive this information along with a note inviting them to the meeting. The Website Coordinator will add the information to the website.
- if you want the Membership Chair to take reservations for a future meeting, make that request at this time.
- if any payments are involved contact the Treasurer, who email a form to complete. This form will indicate the amount and to whom to make the check payable. The budget category is "Programs".

**Thursday prior:**

- email or call program participants to confirm all arrangements, including the time you and others will arrive at the location. Review the flow of the evening's activities.
- prepare a few appropriate notes to introduce the speaker.
- contact the RMGA Secretary and request RMGA letterhead and envelopes for your follow-up Thank You letter(s). You can ask for this anytime. Just don't forget it.

**Meeting Night:**

- arrive 30 minutes prior to the arrival time for members.
- touch base with all involved to confirm last minute arrangements. Introduce host/speaker to individual members, encourage conversation and interaction.
- whether you or the president is calling the group to order, make sure to **START ON TIME!**
- give an appropriate brief introduction and also express appreciation at the end. Be prepared to announce that we have time for one more question as a way to conclude the program. Always be prepared to find a polite way to end the program if it starts to run too long.

**Day after:**

- send a Thank You letter to the speaker or host (**yes, we send a real letter on RMGA letterhead**). Also, forward a copy of the Thank You to the RMGA Secretary for the files.
- send email thank you to any members or support staff at the venue who assisted.
- if a staff member at the venue was especially helpful, it is worth the effort to get the name and email address of the person's supervisor and copy that person on the Thank You.

***Education Committee*****Activities:**

- perform duties as specified in the By-Laws, consistent with RMGA Articles of Incorporation as well as Policies and Procedures.
- The Education Chairperson is responsible for recruiting members of the Committee, and is advised to actively develop his/her successor to minimize transition complexities.
- recommend, plan, arrange and supervise educational programs, familiarization trips and other courses and activities related to the purposes of the Corporation.
- keep records of membership participation in such activities and reports, including financial data on revenue, costs, expenses of each activity, and promptly report this information to the Board of Directors.

**FAM Definition**

A FAM is a complimentary or reduced rate travel program designed to acquaint travel industry representatives with a specific destination to stimulate the sale of travel.

**Mutual Expectations**

Our members are motivated by what they will learn by becoming more familiar with a destination and our hosts are motivated by the ripple effect of the many contacts our members have with the traveling public. We encourage RMGA members to repay their hosts' hospitality by recommending these destinations whenever appropriate.



## **Planning Horizon**

It is the goal of the Education Committee to submit a complete list of planned activities with confirmed dates for the following year to the RMGA Board of Directors in early December, as recommendations subject to Board approval. To accomplish this, the committee needs to be actively communicating with the following year's potential hosts throughout the year but with emphasis starting no later than September.

## **Destinations**

The method of choosing FAM destinations is multi-faceted. The committee may choose to ask members to submit their preferences. The committee may identify a short list of potential destinations where hosts have shown an interest, then ask members to indicate their preferences. At other times there may be destinations that are not well known where the committee feels that the potential FAM is so interesting we should promote it. There is no one method that the committee should be obliged to use. The committee recognizes that the final decision regarding destinations rests with the Board of Directors.

## **Registration fees**

In order to obtain a commitment from participating members and to emphasize the value of the activity, in most cases there should be a payment required even if the activity is fully hosted. If non-members are allowed to participate, the fee level should be set at a level which encourages membership, which also reinforces to members the value of their membership.

It is imperative that the FAM Coordinator collect the appropriate payment from each participant by the deadline date. There is no registration until payment is received.

As required by RMGA policy, the registration information needs to clearly state a date by which members may cancel and receive a full refund. There are no refunds after that date unless an exception is made by the Board.

## **Financial reimbursement**

If members of the Education Committee incur expenses in creating FAMs, these may be reimbursed from the committee budget. Such expenditures need to be kept to a minimum and within budget, and will be charged to the Committee's budget.

Receipts submitted to the Treasurer for reimbursement must include the name of the person whose expense is reimbursed, and must be accompanied by a form distributed by the Treasurer specifying the

account to be assessed, the amount, the activity, and other pertinent information.

## **Participation**

In most cases, only RMGA members may attend FAMs or seminars unless the Board determines otherwise.

This issue is of most concern for FAMs of more than one day duration, since they represent a significant investment by hosts and are a significant benefit to members. Sometimes we need extra bodies to make the trip possible, typically, when RMGA is chartering a motor coach. If non-members are allowed to participate, they need to be individuals actively engaged in the travel and tourism industry, or supporters of those who are members. The committee's suggestion for any specific FAM should be included in the FAM proposal to the Board.

In cases where there is a limitation on the number of people who may participate, reservations will be accepted on a first come/first served basis first for members in the Professional, Associate, Business (one person only) and Student categories, then members who are Friends or Retired. Reservations for members in the Friends and Retired categories will be accepted on a standby basis, as will any Professional, Associate, Business and Student Members in excess of the FAM maximum. Once the reservation deadline has passed, spaces will be allocated to Professional, Associate, Business, and Student Members first, then Friends and Retired Members, then non-members on a space available basis.

Current RMGA policy provides that one person from each Business membership may participate in any RMGA activity.

## **Gratuities and compensation**

RMGA members receive no compensation or have their fees waived for their efforts on behalf of the association, and that includes gratuities for acting as a tour guide for a FAM or event. Members contribute to the association in a variety of ways, all of which are uncompensated.

## **Contracts**

Only the Board of Directors may authorize an officer or agent to enter into or execute a contract. Committee chairpersons and members are not so authorized.

## **Legal Issues**

There may be questions related to potential legal liabilities associated with activities of the Education Committee. Any potential liabilities the

committee sees should be identified in the FAM proposal. It is up to the Board of Directors to identify, discuss, and resolve such issues to their satisfaction. All committees need the Board's guidance and direction in this regard. It is important to identify these potential liabilities as early in the planning process as possible.

Each participant, whether a member of RMGA, a guest, or other participant, in a FAM trip or other activity of or sponsored by RMGA, shall be required to sign and provide to RMGA a Release of Liability in the form supplied by RMGA.

### **Bi-annual seminar**

The RMGA Seminar is a responsibility of this committee. The Seminar is usually held in alternate years, typically after tour season and thus, early November. It is preferable to have one member responsible for the Seminar. That member may choose to involve others as a sub-committee. The member responsible for the Seminar needs to be identified in the year prior to the event, to allow ample time for organization and scheduling.

### **Car-pooling and FAMs**

Carpooling: When travel for an RMGA FAM is by personal auto, the RMGA function is to encourage ride sharing. We designate an assembly point simply to facilitate ride sharing. Members who wish to get together on their own, or individuals who wish to drive without sharing rides, do not need to come to the assembly point. However, the FAM Coordinator should attempt to get an indication in advance of any participants not coming to the assembly point and make sure they have complete information regarding the first meeting location at the destination.

RMGA does not encourage traveling in a caravan where drivers attempt to follow one another. Each driver needs to know where he or she is going and have all necessary information to arrive at the destination independently. RMGA also encourages non-drivers to share the cost of fuel for the driver at the conclusion of the trip. This is a totally voluntary gesture of appreciation.

### **Release of Liability Form**

- Each participant in a FAM trip or other activity of or sponsored by RMGA, is required to sign and provide to RMGA a Release of Liability using the form supplied by RMGA. No person will be permitted to participate in the FAM or other activity, or any part or portion thereof,

until his or her signed release form is in the possession of the FAM leader.

- See the Bylaws for a sample Release of Liability form. A separate form is required for each RMGA FAM or activity. Each form, as prepared, must include information on potential risks specific to this activity, for example, climbing stairs, walking a mile.

## **Suggestions for organizing FAMs**

### **Plan the event:**

- Determine FAM date(s). Tuesday, Wednesday, or Thursday seem best for scheduling a FAM. Members are more available and so are the venues.
- Set the date. Set the FAM date near the end of the month so that both the newsletter and the program meeting can provide a promotion opportunity while still allowing time to meet the mid-month registration deadline.
- Plan on approximately 15 to 20 in attendance. Try to allow space for last minute registrations, usually at least one or two more.
- Contact venues to make arrangements. Record contact information (mailing addresses, emails, websites, phone numbers with extensions, spelling of names, dates contacted by what method) for each venue.
- Request information from each venue about specific operational details. Note details: entrance locations, security procedures, reservation procedures, ticket purchase and payment procedures, confirmation procedures, parking, directions, fees, meal locations nearby with reservation details, and the amount of time to allow for tours or presentations.
- Produce a schedule of the FAM's events.
- Determine mode of transportation and cost. If carpooling, suggest sharing the cost of gas but do not set price or require it.
- When setting pricing and deadlines, determine a member, non-member and early bird registration fee.
- Clearly state a date by which members may cancel and receive a refund. This is required by RMGA policy. This date should be sufficient time prior to the event or activity that RMGA would not incur charges or expenses relating to the party requesting the refund if the party does not attend or participate. After that date there are no refunds unless the Board makes an exception. Set the date for refunds at least one day later than the reservation deadline. If there is no available space for someone who is a "Friend", there may be a companion voting member who chooses to cancel. It should be possible for this to

take place without penalty.

- If fees are involved, contact venues to find out how payment should be made. Work with the Treasurer to develop a procedure for payments.
- Create a statement regarding Priority of Participation to be part of the standard information regarding each Education Committee activity regardless of whether we have a limitation on space
- Prepare a proposal to the Board, and submit as far in advance as feasible, at least two months if possible. Make sure the Board knows of any contracts that will need to be signed.
- Submit a requested budget based on the planned activities
- Write a detailed description to clearly explain how we will handle a standby list if one is necessary

### **Two months prior:**

- After obtaining Board approval, create an announcement for the newsletter and the Email Distribution Committee. The announcement is a paragraph overview of the program. Include date, time, and locations and costs.
- Work with the newsletter editor to determine content and length. Email the announcement draft to the editor by the 20<sup>th</sup> of the month.

### **One month prior:**

- Create an email announcement and a newsletter announcement in detail. Include the name of FAM, date, time, locations, schedule of events, cost, reservation information, reservation deadline, transportation mode, notification of required release waiver, any security requirements and contact information for more information.
- Email the email announcement to the RMGA Email Distribution manager to disseminate by the 15<sup>th</sup> of the month.
- Email the newsletter announcement to the newsletter editor by the 20<sup>th</sup> of the month. Work with the editor to determine content and length. The newsletter will be distributed by the first day of the following month, the same month of the FAM.
- Provide the editor with the mailing addresses for all program participants. The editor will send them a copy of this newsletter and also the follow-up newsletter after the meeting. If there is more than one person in an individual office, only send one newsletter.
- Require that payment be included with registration by check. Cash and credit cards are not accepted.
- State clearly in the promotional materials that there are no refunds

after the deadline.

- Inform the legal advisor a month out that a liability waiver form will be needed; send the materials no sooner than ten days out from the event, to accommodate all last-minute changes. Provide the legal advisor with a description of all potential activities, for example, climbing stairs, walking a mile.
- When a registration with check is submitted, email a confirmation along with the liability release form to be completed in duplicate. The registrant mails one copy to the legal advisor before the date of the FAM and the other the registrant brings it to the FAM to submit to FAM leader in person who has them on-hand for emergency information. The FAM leader should bring a supply of liability release forms to provide to those participants in need of a blank copy.

### **Month of the FAM:**

- Create an email reminder including name, date, time, cost, registration information and deadline. Send the email reminder to the Email Distribution manager to distribute before the membership meeting of that month.
- Ask for time at the membership meeting to promote the FAM including details and be prepared to accept registration and payment at that meeting.

### **Week before:**

- Contact all venues to confirm details and provide final number in attendance.
- Check with the legal advisor a couple days in advance to make sure the waivers have arrived.
- Create a detailed guideline including information on parking (location and cost), remaining costs (lunch, suggested gratuities), weather and dress, level of activity, security requirements, schedule of events with location addresses, entrance locations and meeting times and a reminder to bring the completed liability release form. Send to each registrant via email.
- Create a master list of registered participants including their cell phone numbers and email contact information.

### **Day of FAM:**

- Arrive 30 minutes prior to the arrival time for participants.
- Confirm attendance of each person on master list of participants.

- Make certain that all liability forms have been collected. Those submitted on-site should be mailed before commencing the FAM.
- Start and end on time at each venue. As FAM leader, you will keep the group on time and on task.
- Ask to speak to your contact person at each venue. Introduce RMGA and give an appropriate brief introduction of your contact person and also express appreciation at the end for each venue contact.

### **Day after:**

- Send a Thank You letter to the speaker or host **(yes, we send a real letter on RMGA letterhead)**. Also, forward a copy of the Thank You to the RMGA Secretary for the files.
- Send email thank you to any members or support staff at the venue that assisted.
- If a staff member at the venue was especially helpful, it is worth the effort to get the name and email address of the person's supervisor and copy that person on the Thank You.
- Per the bylaws, records are to be kept of Member participation in such activities and reports, including financial data on revenue, costs, and expenses of each activity, shall be promptly made to the Board of Directors.

## ***Certification Committee***

### **Activities:**

- Perform duties as specified in the By-Laws, consistent with RMGA Articles of Incorporation as well as Policies and Procedures.
- Develop a plan for certification and re-certification of professional tour guides and tour managers / directors to submit to the Board of Directors for approval. The certification plan is to include study materials, test and testing materials, answer sheets, eligibility criteria, criteria for pass/fail, and Membership materials for successful completion (certificate, name tag, website profile listing) The universe of information is the Rocky Mountain area, with emphasis on the Denver Metropolitan Area.
- The Certification Committee Chair shall recruit members of the Committee, and is encouraged to actively develop successors to minimize transition complexities.
- After adoption of a plan, the Committee will be charged with the implementation and execution of the plan and making

recommendations for changes in it, as necessary, for consideration by the Board of Directors.

- Review existing materials for usefulness using these criteria:
  - is this topic important enough to be included, and have we included all important topics in the study materials?
  - to what level of detail shall the certified member be knowledgeable?
  - is the information available by commonly used sources?
  - how do we measure competence in this area?
- Develop a study guide, and make it available to all Members at a cost to be determined by the Board, currently \$10
- Create a test which measures competence, and develop an answer sheet
- Offer the certification test as often as Board determines, currently one or two times a year in April and November, for a charge determined by the Board, currently \$40, and valid for two attempts at the exam. Further test opportunities cost \$40 per two attempts
- Develop criteria, materials, and procedures for re-certification; see Members Only section of the website for current procedures. Revise as appropriate.
- Periodically revise the study guide (add, delete, reword)
- Verify eligibility to participate in the certification program
- Collect fees, provide copies of study guide
- Notify all participants of their pass/fail status
- Collect all copies of tests and materials
- Provide certificates and name tags to newly certified Members

## ***Newsletter Committee***

### **Activities:**

- perform duties as specified in the By-Laws, consistent with RMGA Articles of Incorporation as well as Policies and Procedures.
- see to the editing, printing, and distribution of a periodic newsletter for the Members to include, but not be limited to, information about the Corporation, its activities and meetings, notices, and such other material as may be of interest and benefit to the Members.



### **Gather material**

- to include, but not be limited to, information about the Association, its activities and meetings, notices, and such other material as may be of interest and benefit to the members.
- if possible, attend Board meetings, programs, and RMGA activities as it provides information and a “feel” for the article subject.
- specify a due date for articles to be submitted, typically, the 20<sup>th</sup> of the month
- send out an email reminder to likely submitters – Board members, committee chairs – before the deadline; request a “yes/no” response to help with planning;

### **Typical content in newsletter; give credit to authors of articles by name and with contact info**

- President’s letter
- Board reports
- Committee reports
- upcoming meeting information
- past meeting summary and speaker information
- information on local activities which might be of interest to members; include name of activity, contact person; sources: local newspapers, subscribed e-mail list, tourism related events, tv; community calendars
- article expanding on local events or history
- article on “topic of the month,” perhaps expanding on a meeting or FAM subject, or one providing professional development
- upcoming FAM information
- recent FAM overview, with contact information of suppliers
- recognize contributors; name event sponsors and suppliers, and provide them with visibility in return for their support of RMGA
- abbreviated article on the recent program and FAM. The full article is on the website under the “Member Only” tab.

### **Mechanics of mailing**

- arrange with Membership to be updated on names and contact information, to include in the mailing list;
- paper weight impacts mailing costs

- number of pages impacts mailing costs; each sheet of paper adds two pages to the newsletter; normal newsletter is 6 pages max of 8 pages. This will change in time.
- send copies to: members, program speakers, guests at meetings and FAMS, suppliers, associations of which RMGA is a member, event sponsors, and others as appropriate. Review list quarterly and adjust distribution list as appropriate.
- newsletters sent in advance of an RMGA election must be mailed at least ten days prior to the event
- mail newsletter on the first of the month if possible

### ***Nominating Committee***

#### **Activities:**

- perform duties as specified in the By-Laws, consistent with RMGA Articles of Incorporation as well as Policies and Procedures.
- nominate one or more candidates for each office to be filled;
- provide each candidate, whether nominated by the Committee, from the floor at the October Regular Meeting, or otherwise, in writing at or prior to the October Regular Meeting of the Members, with written information about the Office and its duties for which the candidate has been nominated;
- obtain written consents to serve if elected from each candidate; and
- assist the Officers/ Directors in the conduct of the election.
- provide list of nominees to be presented for consideration at the October membership meeting
- accept nominations from the floor at the October meeting, with the caveat that the proposed nominee must agree in advance of the meeting to have their name submitted for consideration
- in the event of the resignation or removal of an officer, except the President, appoint a replacement, subject to approval by the Members at the next Regular Meeting of the Members.

### ***Financial Review Committee***

#### **Activities:**

- perform duties as specified in the By-Laws, consistent with RMGA Articles of Incorporation as well as Policies and Procedures.

- The President shall appoint the members of the Financial Review Committee subject to the approval of the Board of Directors.
- as a committee, review the books and accounts of the Treasurer as soon as possible after January 1 each year, returning the same to the Treasurer or the newly elected Treasurer no later than January 31 of that year.
- provide a written report of the Committee's review and any recommendations it may have to the Board of Directors.

## ***Public Relations Committee***

### **Activities:**

- perform duties as specified in the By-Laws, consistent with RMGA Articles of Incorporation as well as Policies and Procedures.
- act as an outreach to the general public, the media, government officials, and tour related industries and companies from the Association concerning its purposes and activities
- attend or identify a representative to attend the Tour Colorado meetings on behalf of RMGA; write a report of the meeting for the newsletter and Board, including information of interest to our members
- attend or identify a representative to attend any other events that would be useful to the membership; write a report for the newsletter and Board
- educate the RMGA membership of the purpose and value of all the affiliations that RMGA holds for a member.
- maintain connections with Tour Colorado, Visit Denver, Colorado Springs Convention and Visitors Bureau The National Federation of Tourist Guides Associations, USA (NFTGA), the Colorado Tourism Office (CTO), and the World Federation of Tourist Guide Associations (WFTGA);
- share information of interest to tour guides, with the RMGA membership from these groups as well as other Colorado tourism activities
- make sure all RMGA updates are made to the web sites of affiliations of which we are members
- make sure RMGA dues for these associations are paid on time
- be aware of any other activities that would be of interest and benefit to the RMGA membership

- secure a current membership list and distribute it as directed by the Board of Directors to those who have need of both over-the-road and local tour guides and managers/directors.

### ***Website Management Committee***

#### **Activities**

- perform duties as specified in the By-Laws, consistent with RMGA Articles of Incorporation as well as Policies and Procedures.
- oversee the RMGA website
- support the purpose of website activities, which is to serve as a resource for travel industry businesses wishing to hire RMGA members, provide a means of communication to and between RMGA members, provide information as to the benefits of and process for becoming an RMGA member and serve as a resource for RMGA organizational documents.
- duties shall include, but not be limited to maintaining, updating and enhancing the website, insuring its accuracy and security, providing documentation and meeting the objectives of the website defined in the original scope document as set forth above.
- website address is: [www.rockymountaintourguides.com](http://www.rockymountaintourguides.com)

### ***Hospitality Committee***

#### **Activities**

- perform duties as specified in the By-Laws, consistent with RMGA Articles of Incorporation as well as Policies and Procedures.

### ***E-Mail Distribution Committee***

#### **Activities**

- perform duties as specified in the By-Laws, consistent with RMGA Articles of Incorporation as well as Policies and Procedures.
- disseminate, within twenty-four (24) hours of receipt, all email communication sent to the Committee for the Membership
- send said emails to all Members of the Corporation, irrespective of membership category
- not alter the emails to be sent, nor restrict or modify the number of people to whom the message shall be sent, unless directed in either case by the Board of Directors.

- utilize the most current roster, provided by the Membership Committee, on a continuing basis.
- provide the Board of Directors with the most current information so that the Board can make informed decisions about information management

## **Appendix A: Preparing for the next revision: Historical documents**

\*The Board will soon take up the topic of storing historical information and reducing the amount of paper documents stored any where. When the plan is finalized, it likely will develop a plan which will become part of the RMGA Policies and Procedures. It likely will give committee chairpersons the responsibility of gathering information, perhaps scanning it, and/or otherwise storing it for future reference. The details of that responsibility should be stated here.

## **Appendix B: Preparing for the next revision: Education Committee**

A preliminary document has already been prepared, to become part of the next revision of the Best Practices Handbook. This document remains a work in progress, and may be revised at any time before decisions about the next revision are made. The Education Committee description is this:

**Activities:** The Education Committee performs duties as specified in the RMGA Bylaws, consistent with the Articles of Incorporation as well as Policies and Procedures.

- The Education Chairperson is responsible for recruiting members of the Committee, (6.1) and is advised to actively develop his/her successor to minimize transition complexities.
- Recommend, plan, arrange, and supervise educational programs, Familiarization (FAM) trips, and other courses and activities related to the purposes of the Corporation. (6.2(a))
- Report Member participation of each activity promptly to the Board of Directors. (6.2(a))
- Report data on revenue, costs, and expenses of each activity promptly to the Board of Directors. (6.2(a))

**As of 2015, the Education Committee conducts these programs in fulfillment of its duties:**

- Familiarization Trip (FAM) – One-day duration; four per calendar year
- Seminar – One-day duration; one per calendar year; alternating with the Familiarization Trip, Extended (FAMX)
- Familiarization Trip, Extended (FAMX) – Multi-day duration; one per calendar year, alternating with the Seminar

### **Programs**

#### **Destination and Topic Selection**

The method of choosing destinations and topics is multi-faceted. The Education Committee may choose to ask Members to submit their preferences. The Committee may identify a short list of potential destinations and topics where hosts

have shown an interest, then ask Members to indicate their preferences. At other times there may be destinations and topics that are not well known where the Committee feels that the destination or topic is so compelling that the Committee should promote it. There is no one method that the Committee should be obliged to use.

The Committee recognizes that the final decision regarding destinations and topics rests with the Board of Directors.

### **Planning Horizon**

It is the goal of the Education Committee to submit to the RMGA Board of Directors in early December of the previous year a complete list of planned activities with confirmed dates for the next calendar year as recommendations for approval. To accomplish this goal, the Education Committee needs to actively communicate with the next year's potential hosts throughout the year, but with emphasis starting no later than September.

### **Registration Fees**

To obtain a commitment from participating Members and to reinforce the value of the activity, there should be a payment required, even if the activity is fully hosted.

To recognize that the availability of the activity is a benefit of membership in RMGA, the amount of the fee should be made nominal.

In 2015, the Education Committee used the following registration fees:

- Familiarization Trip (FAM) – \$10
- Seminar – \$30
- Familiarization Trip, Extended (FAMX) – \$50

It is imperative that the appropriate payment be collected from each participant by the deadline date. There is no registration until payment is received.

As required by RMGA Policy, the registration information needs to clearly state a date by which members may cancel and receive a full refund. There are no refunds after that date, unless an exception is made by the Board of Directors.

### **Financial Reimbursement**

If members of the Education Committee incur expenses in creating activities, these may be reimbursed from the committee budget. Such expenditures need to be kept to a minimum and within budget, and will be charged to the Committee's budget. Receipts submitted to the Treasurer for reimbursement must include the name of the person whose expense is reimbursed, and must be accompanied by a form distributed by the Treasurer specifying the account to be assessed, the amount, the activity, and other pertinent information.

### **Participation**

Only RMGA Members may attend a FAM, Seminar, or FAMX, unless the Board of Directors determines otherwise.

Because of the limitation on the number of people who may participate, reservations will be accepted on a first come/first served basis. Once the reservation deadline has passed, spaces will be allocated

First, to Professional, Associate, Student, and Business (one person only) Members, in the order of their receipt.

Then, if available space remains, to Friend and Retired Members in the order of their receipt.

Since a FAMX is of more than one-day duration, represents a significant investment by Hosts, is of significant benefit to Members, and involves chartering a motorcoach, having additional people participate to make the trip possible becomes an important consideration. Additional participants need to be individuals actively engaged in the travel and tourism industry, or supporters of RMGA Members and then admitted as RMGA Members before the FAMX begins. The Committee's specific suggestion for additional participants should be included in the proposal to the Board of Directors.

### **Financial Compensation and Gratuities**

RMGA Members receive no compensation for their efforts on behalf of the Association. This exemption extends to having their fees waived or receiving a gratuity for acting as a tour guide for a FAM or event. Members contribute to the Association in a variety of ways, all of which are uncompensated.

Fees may be paid to specialist presenters for the seminar.

Gratuities should be paid to table-servers, bartenders, etc.

### **Contracts**

Only the Board of Directors may authorize an Officer or Agent to enter into or execute a contract. Committee Chairpersons and Committee Members are not so authorized.

### **Legal Issues**

There may be questions related to potential legal liabilities associated with activities of the Education Committee. Any potential liabilities the committee sees should be identified in the FAM proposal. It is up to the Board to identify, discuss, and resolve such issues to their satisfaction. All committees need the Board's guidance and direction in this regard. It is important to identify these potential liabilities as early in the planning process as possible.

Each participant, whether a Member of RMGA, a guest, or other participant, in a FAM trip or other activity of or sponsored by RMGA, shall be required to sign and provide to RMGA a Release of Liability in the form supplied by RMGA.

### **Car-pooling**

When travel for an event is by personal auto, RMGA encourages ride sharing. The Event Coordinator designates an assembly point simply to facilitate ride sharing. The Event Coordinator should be informed in advance of participants who are traveling



on their own and not meeting at the assembly point. These participants should have all necessary information to arrive at the destination.

RMGA does not encourage traveling in a caravan, where drivers attempt to follow one another. Each driver needs to know where he or she is going and have all necessary information to arrive at the destination independently.

RMGA encourages non-drivers to share the cost of fuel for the driver at the conclusion of the trip. This is a totally voluntary gesture of appreciation.

### **Release of Liability Form**

Each participant in a FAM trip or other activity sponsored by RMGA is required to sign and provide to RMGA a Release of Liability using the form supplied by RMGA. No person will be permitted to participate in the FAM or other activity, or any part or portion thereof, until his or her signed release form is in the possession of the FAM leader.

See the RMGA Policies for Government of the Corporation for a sample Release of Liability form. A separate form is required for each RMGA FAM or activity. Each form, as prepared, must include information on potential risks specific to this activity, for example, climbing stairs, walking a mile.

## **Familiarization (FAM) Trips**

### **Definition**

A Familiarization (FAM) Trip is a complimentary or reduced-rate travel program designed to acquaint travel industry representatives with a specific destination to stimulate the sale of travel to that specific destination.

**Mutual Expectations**

RMGA Members are motivated by what they will learn by becoming more familiar with a destination. RMGA hosts are motivated by the ripple effect of the many contacts RMGA Members have with the traveling public. RMGA encourages Members to repay their Hosts' hospitality by recommending these destinations whenever appropriate.

**Bi-annual Seminar****Definition**

The RMGA Seminar is a responsibility of this committee. The Seminar is usually held in alternate years, typically after tour season and thus, early November. It is preferable to have one member responsible for the Seminar. That Member may choose to involve others as a sub-committee. The Member responsible for the Seminar needs to be identified in the year prior to the event, to allow ample time for organization and scheduling.

**Familiarization Trip, Extended (FAMX)****Definition**

A Familiarization Trip, Extended (FAMX) is a complimentary or reduced-rate travel program of more than one day designed to acquaint travel industry representatives with a specific destination to stimulate the sale of travel to that specific destination.

**Mutual Expectations**

RMGA Members are motivated by what they will learn by becoming more familiar with a destination. RMGA hosts are motivated by the ripple effect of the many contacts RMGA Members have with the traveling public. RMGA encourages Members to repay their Hosts' hospitality by recommending these destinations whenever appropriate.

**Suggestions for Organizing Events****Plan the Event:**

- Determine a Date. Tuesday, Wednesday, or Thursday seem best for scheduling an event. Members are more available and so are the venues.
- Set the Date. A date near the end of the month means that both the newsletter and the program meeting can provide a promotion opportunity while still allowing time to meet a mid-month registration deadline.
- Budget for an attendance of 15. Set the maximum number of attendance to 20.
- Contact venues to make arrangements. Record contact information (mailing addresses, emails, websites, phone numbers with extensions, spellings of names, dates contacted and by what method) for each venue.
- Request information from each venue about specific operational details. Note details: entrance locations, security procedures, reservation procedures, ticket purchase and payment procedures, confirmation procedures, parking, directions, fees, meal locations nearby with reservation details, and the amount of time to

allow for tours or presentations.

- Produce an agenda of the event's activities.
- Determine mode of transportation and cost. If carpooling, suggest sharing the cost of gas but do not set price or require it.
- Clearly state a date by which Members may cancel and receive a refund. This is required by RMGA policy. This date should be sufficient time prior to the event that RMGA would not incur charges or expenses relating to the party's requesting a refund. After that date there are no refunds unless the Board makes an exception. Set the date for refunds at least one day later than the reservation deadline.
- When facility fees are involved, contact venues to find out how payment should be made. Work with the Treasurer to develop a procedure for payments.
- Prepare a proposal to the Board, and submit as far in advance as feasible, at least two months if possible. Make sure the Board knows of any contracts that will need to be signed.
- Submit a requested budget based on the planned activities.

#### **Two Months Prior to the Event:**

- After obtaining Board approval, create an announcement for the Newsletter Editor and the Email Distribution Committee. The announcement is a paragraph overview of the program. Include date, time, location(s) and cost(s).
- Work with the Newsletter Editor to determine content and length. Send the announcement draft to the Editor by the 20<sup>th</sup> of the month.
- Inform the legal advisor that a liability waiver form will be needed. Provide the legal advisor with a description of all potential activities, for example, climbing stairs, walking a mile.

#### **One Month Prior to the Event:**

- Create an email announcement and a newsletter announcement in detail. Include the name of FAM, date, time, locations, schedule of events, cost, reservation information, reservation deadline, transportation mode, notification of required release waiver, any security requirements and contact information for more information.
- Send the email announcement to the RMGA Email Distribution manager to disseminate by the 15<sup>th</sup> of the month. Include as attachments the registration form, the agenda for the event, and the Waiver of Liability form. The Waiver of Liability form may be electronically signed and submitted by email.
- Send to the Webmaster the registration form, the agenda for the event, and the Waiver of Liability form for publication on the website. The Waiver of Liability form may be electronically signed and submitted by email.
- Send the newsletter announcement to the Newsletter Editor by the 20<sup>th</sup> of the month. Work with the Newsletter Editor to determine content and length. The newsletter will be distributed by the first day of the following month, the same month of the FAM.
- Provide the Newsletter Editor with the mailing addresses for all program

participants. The Newsletter Editor will send them a copy of this newsletter and also the follow-up newsletter after the meeting. If there is more than one person in an individual office, only send one newsletter.

- Require that payment be included with registration by check. Cash and credit cards are not accepted.
- State clearly in the promotional materials that there are no refunds after the deadline.
- Confirm receipt of a registration with check and or a Waiver of Liability is received.

#### **Month of the Event:**

- Create an email reminder including name, date, time, cost, registration information and deadline. Send the email reminder to the Email Distribution manager distribute before the membership meeting of that month. Include as attachments the registration form, the agenda for the event, and the Waiver of Liability form. The Waiver of Liability form may be electronically signed and submitted by email.
- Ask for time at the membership meeting to promote the FAM including details and be prepared to accept registration and payment at that meeting.

#### **Week before the Event**

- Contact all venues to confirm details and provide final number in attendance.
- Check to make sure the Liability Waivers have arrived.
- Create a detailed guideline including information on parking (location and cost), remaining costs (lunch, suggested gratuities), weather and dress, level of activity, security requirements, schedule of events with location addresses, entrance locations and meeting times and a reminder to bring the completed liability release form. Send to each registrant via email.
- Create a master list of registered participants including their cell phone numbers and email contact information.

#### **Day of the Event:**

- Arrive 30 minutes prior to the arrival time for participants.
- Confirm attendance of each person on master list of participants.
- Carry one set of Liability Waiver Forms for the participants.
- Start and end on time at each venue. As FAM leader, you will keep the group on time and on task.
- Ask to speak to your contact person at each venue. Introduce RMGA and give an appropriate brief introduction of your contact person and also express appreciation at the end for each venue contact.

#### **Day after the Event:**

- Send a Thank You letter to the speaker or host (**yes, we send a real letter on RMGA letterhead**). Also, forward a copy of the Thank You to the RMGA Secretary for the files.
- Send email thank you to any members or support staff at the venue that

- assisted.
- If a staff member at the venue was especially helpful, it is worth the effort to get the name and email address of the person's supervisor and copy that person on the Thank You.
  - Submit reports of the event to the Board of Directors.

### **Reports**

**Participants:** Listing name and membership category for each

**Financial Data:** In coordination with the Treasurer, of income and expenses

**Summary:** Brief version for the Newsletter; Detailed version for the Website