

## **Section VI – RMR Region Seminar Registration**

### **A. Seminar Registrar – Job Description**

**[NOTE: The full description is found in Section I.G of the Region Seminar Guidelines]**

### **B. Registration Procedures**

#### **1. General**

- a. Well ahead of the registration date, set up procedures for opening mail and recording registration data.
- b. Works with seminar treasurer to:
  - 1) Establish a system of checking information on the registration form and fee statement (Attachments VI-A & C) and verifying payments.
  - 2) Establish a system of reporting receipt of fees to the treasurer compatible with the seminar bookkeeping system.
  - 3) Keep a list of registrations by postmark date to be compared against treasurer's report of fees collected.
- c. The registrar shall have a copy of :
  - 1) Faculty contracts to know cancellation dates and date teachers expect to receive student list.
  - 2) Letters from faculty to students. It may be necessary to send a copy of the letter with the registration notice for very late registrants. Also, the registrar is the one person whose contact information is available to all.
- d. Region director will notify registrar of the name(s) of region scholarship winners.

#### **2. Early Registration**

- a. Works with seminar chairman, treasurer and brochure chairman to prepare a registration form (see item #3 below). Modifies the registration form for early registration as needed. Early registration form needs to include the following information:
  - 1) Location of seminar & hotel information including room cost.
  - 2) Descriptions and photos (if possible) of classes and kit fees.
  - 3) Non-refundable deposit amount.
  - 4) Total registration fee.
  - 5) Deadline for early registrants total fee payment to retain first class choice.
  - 6) Name, contact information, and class choices.
- b. Receives early registrations at previous retreat or through the mail.
- c. Processes early registration fees as agreed with the treasurer.
- d. List participants by first choice class.
- e. Sends reminder notice to early registrants after the brochure has been sent to remind them of the importance of meeting deadlines.

#### **3. Registration Form for Brochure:**

This is the most important tool in the registration process. Keep it clear and easy to use (Attachment VI-A)

- a. Form shall include: date considered first day of registration; registrant's name,

- mailing address, phone number, e-mail address; food allergies or special needs; person to notify in case of an emergency; EGA membership number and chapter/region affiliation; list of class choices; a list of fees; registrar's mailing and email addresses and telephone number; hours that the registrar will accept phone calls.
- b. A checklist at the end of the form assists the registrant to verify complete and correct registration before form is mailed.
  - c. The fee portion of the registration form shall be laid out in such a way that a check can be laid on top of it, without covering any vital information, and the form and check photocopied.
  - d. If credit card charges are permitted, there shall be a space on the fee form for credit card information including credit card expiration date and IEC code.
  - e. Many registrants are anxious to know that their registration was received. You may wish to specify that if they include an e-mail address, they will be notified.
  - f. Numbering of the classes is very important for later handling of the information, especially if working with the computer. Use of 100 series numbers for one-day classes, 200 series for two-day classes, etc. is suggested.
  - g. The name of the registrant shall be on all pages of the registration form.
    - 1) Include a statement of cancellation policies that gives deadlines for refunds, penalties for canceling after the deadline and date when refund checks will be issued.
    - 2) Some seminars specify that a #10 large self-addressed stamped envelope be included for return of class assignment; others have included the cost of envelopes and postage to registered participants in the seminar budget.
  - h. Makes sure that the registrar's name, mailing and e-mail addresses and telephone number are listed in brochure someplace in addition to the tear out registration form.
  - i. Registrant must be a current member of EGA to participate in instructional classes. This should be made clear in the brochure.

#### **4. Handling Registration Forms**

- a. Opens each envelope as received, record postmark date and date of receipt on all forms and assign a number. Record on a log sheet. Read any enclosed correspondence and take whatever action is appropriate. If participant has failed to enclose a check for payment or failed to provide all necessary information, notify registrant as soon as possible by e-mail or telephone and hold registration for completion of information or payment. No number will be assigned any registration until completed.
- b. Makes copies of each registration form:
  - 1) If check is enclosed, make two copies of the form with the check. One copy is for the seminar treasurer and the other for the registrant's file (see f below).
  - 2) Forward checks or log of deposits to the seminar treasurer in a timely manner, at least weekly.
- c. If class selection is to be done by hand, makes a copy of the class selection page.
- d. Ascertains which chairmen/committees will need copies of the registration forms and make necessary copies.
- e. Verifies information on the registration form and make note on treasurer's copy of any corrections. (Verification can be done automatically by computer as entries are made.)

- f. Files registration form, copy of check, envelope with postmark, and any correspondence in an individual file folder or clear page protector, one for each registrant.

## 5. Computer Registration

- a. Sets up computer entry form in the same format as registration form. The entry form is used for entering, storing, sorting and retrieving the registration information.
- a. Enters sample data and test the forms before entering the real data.
- b. Some computer programs (FileMaker on the Macintosh and many database programs on PCs such as Microsoft Excel) allow the creating of a variety of layouts from the entered information. This is very desirable. If this flexibility is not present, you must very carefully structure your entry form so that it can be used for all needs.
- c. Assigns a registration number to each registrant. This is necessary for the accounting procedures in class assignments.
- d. Class choices shall be listed in such a way that they can be sorted and retrieved. It is only necessary to list the class number.
- e. In addition to class choices, includes a field for class assignment.
- f. If the program has a lookup function, kit fees can be automatically figured after the class assignments have been entered.
- g. It works best if forms are presorted to postmark date and entered in that order. If this is not possible, the system will still work.
- h. Enters data into the computer. Be sure to back up regularly, at least once a day and more often if working long hours.
- i. After the data has been entered, you should be able to sort it, find categories of information, as well as merge data into the “letter to participants”

## 6. Class Assignments

**“THERE SHALL BE NO PREFERENTIAL TREATMENT FOR ANY PARTICIPANT.”**

### Phase 1: Early Registration

1. At the close of the Early Registration period, conduct a lottery, if necessary, to fill oversubscribed classes assigning second or third choices to those not chosen for their first class choice.
  - a. Use a computer program with a random number selection capability to assign classes.
  - b. Use the registration number of the participant, rather than the names, to ensure fairness.
  - c. If random selection is not available:
    - 1) Print list of first choices for each class. These lists shall include the registration number rather than the name.
    - 2) Make class assignments in those classes that are below the maximum number.
    - 3) In a class with more than the maximum number, hold a drawing of the registrants. Make class assignments to the winners of the drawing.
    - 4) Place the remaining registrants from the drawing in the highest choice possible.
2. Even though the computer makes the initial choices when a class goes to lottery, the region seminar registrar must do the final ‘fine tuning.’
3. All assignments depend on whether the class is ultimately cancelled due to low registration and if the early registrant pays her full registration fee by the first day of open registration.

### Phase 2: First Day Registration

1. All registrations postmarked on or before the first day of Open Registration will be assigned to their first class choice if there are openings after Early Registration class assignments.
2. In oversubscribed classes, lottery the participants with a First Day Registration deadline postmark.
3. Make class assignments to the winners of the lottery.
4. Place the participants unsuccessful in the lottery in their highest choice class possible.
5. If no second or third class choice was given by a registrant, the registrant should be contacted and given a choice of one of the classes that is below the maximum number.
6. Every effort should be made to place students in the class of their choice.
7. Once a class assignment has been made and the student notified, a student shall not be moved to another class except under unusual circumstances.

### Phase 3: Open Registration

1. Registration received with a postmark after the First Day, but during the Open registration period shall be assigned to their first choice class by earliest postmark date.
2. If that class is full, then they are given their second or third choice class if possible.
3. For registrants who cannot be accommodated in any of their choices or who did not give a second or third choice, should be contacted by phone or email and given a choice of one of the classes that still has openings.

### Phase 4: Late Registration

1. Registrations made after Open Registration closes are assigned classes last.
2. Place students in the best class of their choice from those classes with available slots.

## 7. Cancellation of Teachers

- a. Notifies seminar chairman and dean of faculty of the classes where enrollment is low enough to consider cancellation.
- b. When notified by the seminar chairman or the dean of faculty of cancelled classes, reassign the participants to another class.
- c. It is recommended that classes be cancelled all at one time, starting with the class with the lowest registration. The reassignment of participants may alter the class count and make a difference in what other class may be cancelled.

## 8. Class Rosters

- a. After class assignments have been made, prepare rosters for each class. These rosters are subject to change until the date of the seminar because of last-minute cancellations and late registrations.
- b. Provides copies of the class rosters to seminar chairman, dean of faculty, teachers and others who need them, see #16. If a computer is used, print mailing labels for the teachers to use on their student letters. Send labels to dean of faculty to be mailed with class lists to teachers.

## 9. Class Assignment Letters (Attachment VI-B)

- a. All letters relating to registrants' registration shall be proofread to check for errors.
- b. If the letter is generated by computer, structure a mail merge letter that will import the name and mailing address of all registrants, as well as, class assignments, kit fee information, etc.
- c. If the letter is generated by hand, structure a letter with blanks to be filled out by hand for class assignment, etc.

- d. Items sent to registrant:
  - 1) Class assignment letter, guest ticket information, Fee Statement (Attachment VI-C), postmark date fees are due, where to remit fees, information on travel and accommodations, cost of parking and ground transportation.
  - 2) Hotel reservation information.
  - 3) Schedule of seminar activities.
  - 4) Other relevant material may be enclosed such as the nametag design. Keep in mind the weight of the enclosures in relation to the amount of postage on the SASE that might have been required with the original registration.

## **10. Handling Money**

- a. Receives all fees and forward them to the seminar treasurer in a timely manner, at least weekly, along with copies of the fee statement.
- b. Provides treasurer with a report, listing the various fees received in a manner that can be entered into seminar bookkeeping system.
- c. If checks are to be sent through the mail, use a “Deposit Only” stamp before mailing. The stamp shall include the name of the bank and the account number.
- d. The registrar shall keep a list of checks that are sent through the mail.
- e. If a registrant stops payment on a check, that person is put at the bottom of the list until all bank charges are reimbursed. Exceptions may be made by arrangement with the registrar after consultation and agreement by the seminar chairman. Document all decisions.

## **11. Cancellations by Registrants**

- a. Canceling before the date specified in the seminar brochure will result in refunds minus the non-refundable portion of the registration fees. The seminar treasurer shall be notified of all cancellations. (Attachment VI-E)
- b. Canceling after the date specified will result in refunds of any refundable activity. The seminar treasurer shall be notified of all cancellations. Refunds of kit fees shall be made according to teacher contract. (Attachment VI-E)

## **12. Filling of Cancellations**

- a. Openings due to cancellations will be filled on a first-come basis by new registrants or those displaced by the cancellation of a teacher. (Attachment VI-D)
- b. Every effort shall be made to place students in the class of their choice but once a class assignment has been made (registrant notified), a student will not be moved to another class except under unusual circumstances.

## **13. Identification of First-Time Seminar Attendees**

Ribbons or stickers or other means of identifying first-time seminar attendees are a nice touch. Be sure to let all attendees know what the item indicates.

## **14. Registration Packets**

- a. A packet for each registrant shall be prepared in advance of seminar and organized alphabetically.
- b. Place name and registration number on outside of the packet which shall contain:
  - 1) List of special events in which registrant is a participant
  - 2) Tickets to events
  - 3) First-timers indication, as appropriate
  - 4) Notice of amount due or refund check

- 5) Name tag, if provided
- 6) Notices of any new or changed information
- 7) Participant's notebook
- 8) Table assignment for Merchandise Night, if applicable

### **15. Registration Table at Seminar**

- a. Works with seminar chairman on location and determine equipment needed. Ensure there will be sufficient room for all registration materials, as well as for a smooth traffic flow.
- b. Works with chairman of volunteers on number of workers needed and times they are needed.
- c. Materials to be distributed: Registration packet, participant's notebook, goody bag, seminar pin.
- d. The seminar treasurer or designated representative shall be present to collect any outstanding fees.
- e. Be prepared to sell any extra special events tickets or other items as requested.
- f. Ask each person to check the registration packet immediately to be sure that all items have been included.
- g. It is helpful to split up registration lines alphabetically.
- h. It is wise to open the registration process about 30 minutes before the published time. This will cut down on the lines.

### **16. Lists**

The following people need the following lists and copies:

- Seminar Chairman: All lists
- Dean of Faculty: Two copies of class rosters, mailing labels for teachers
- Angel Chairman: Class rosters
- Certificate Chairman: Class rosters
- Notebook Chairman: List of names, mailing and e-mail addresses and phone numbers , plus a list of class assignments; faculty names, mailing and e-mail addresses and phone numbers; list of Merchandise Night participants
- Treasurer: Copies of registration forms, fee statements, checks, list of cancellations, report of bookkeeping entries
- Merchandise Night Chairman: List of merchants
- Region Director: Registrant list

Postmark date \_\_\_\_\_

(Logo)

Name of seminar  
RMR 20xx Seminar Registration Form  
(Please Print)

Name

\_\_\_\_\_

Your name, as you wish it to be printed in the handbook

\_\_\_\_\_

Address

\_\_\_\_\_

City, State,

Zip \_\_\_\_\_

Telephone ( day) \_\_\_\_\_ (evening) \_\_\_\_\_

Email

\_\_\_\_\_

Region \_\_\_\_\_ Chapter/MAL \_\_\_\_\_

EGA Member # (required) \_\_\_\_\_

Emergency Contact Information: Name \_\_\_\_\_

Relationship \_\_\_\_\_

Telephone

(day) \_\_\_\_\_ (evening) \_\_\_\_\_

- I am a first time attendee
- I am a life-member of EGA
- I am my chapter's region representative

Do you need a roommate?  yes  no

**SPECIAL NEEDS:**

Mobility (Example: I use a wheel chair)

\_\_\_\_\_

Dietary—(Please specify)

\_\_\_\_\_

## CLASS SELECTION

1<sup>st</sup> Choice # \_\_\_\_\_ Title \_\_\_\_\_ Teacher \_\_\_\_\_

2<sup>nd</sup> Choice # \_\_\_\_\_ Title \_\_\_\_\_ Teacher \_\_\_\_\_

3<sup>rd</sup> Choice # \_\_\_\_\_ Title \_\_\_\_\_ Teacher \_\_\_\_\_

Would you like to be a class Angel? \_\_ yes

Would you like to volunteer in another way? \_\_ yes



RMR 20~~xx~~ Seminar Registration Form (continued)

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

**SEMINAR FEES**

Registration- includes classes, \_\_ meals, &amp; non-refundable registration fee \$XXX \_\_\_\_\_

Late Registration Fee (postmarked after *month, day, year*) \$ XX \_\_\_\_\_

Facility Use Fee (Commuter Fee) \$ XX \_\_\_\_\_

**Guest Meal Fees**

(all meals) \$ XX \_\_\_\_\_

(Opening banquet) \$ XX \_\_\_\_\_

(Closing banquet) \$ XX \_\_\_\_\_

(Friday lunch) \$XX \_\_\_\_\_

(Saturday lunch) \$XX \_\_\_\_\_

**Region meeting lunch** (if not a member of the board) \$XX \_\_\_\_\_**Merchandise Night**

Full table \$XX \_\_\_\_\_

Half table \$XX \_\_\_\_\_

**Subtotal** \_\_\_\_\_**Less early registration credit if you pre-registered** \$ XX ( \_\_\_\_\_ )**TOTAL DUE** (check number \_\_\_\_\_) \_\_\_\_\_**Send check or money order (only) made out to: RMR Seminar 20~~xx~~, along with a self-addressed, stamped envelope to:**

Name and Address of Registrar

Phone Number (hours that calls will be accepted, no collect calls, etc.)

E-mail address

[Seminar Cancellation Policy here]

**Make of copy of this form (front and back) for your personal records.**

## Sample of **Class Assignment Letter to Participants**

Letterhead/Logo

Dear

We are pleased to inform you that we have registered you for class at the Rocky Mountain Region, EGA Seminar 20xx, dates, and place. We hope you are as excited as we are and are pleased with the class we have assigned you.

Class:

Activities (Region Meeting):

Guest Tickets:

Kit Fees: To speed registration and make it easier for everyone, all fees will be collected in advance. Please refer to the statement attached and send the form and your check made out to "Seminar 20xx" postmarked no later than \_\_\_\_.

Registration: Date, time

Please register with the hotel and after you have settled in your room, please come by the seminar registration desk location and register for seminar. We will have your seminar notebook, tickets and related items waiting for you.

Hotel: Please use the enclosed hotel information to make your hotel reservation. Each participant is responsible for her own hotel arrangements. We ask that ~~all~~ Seminar 20xx participants, teachers and students alike, share a room. Please coordinate directly with your preferred roommate.

Clothing: (give indication of type of dress, warm or rain gear, walking shoes, etc. Suggest layered clothing for classroom and other functions in air-conditioned rooms.)

Emergency Telephone Numbers: For the convenience of your family, the emergency telephone number for Seminar 20xx is \_\_\_\_\_. This number is available during \_\_\_\_ (times) \_\_\_\_ when messages will be delivered to the participant.

Equipment: Bring any of your favorite needlework aids such as magnifiers, lights, etc. We also suggest an extension cord. The letter from your teacher will identify any special equipment you may need.

Name Tags: Please don't forget to bring your name tag!

**(Insert other information on special events, shopping, transportation here.)**

If you have any questions or problems, please e-mail the registrar at \_\_\_\_\_ or call the registrar at (\_\_\_\_) \_\_\_\_\_ between \_\_\_\_\_ and \_\_\_\_\_. We are sorry but we are unable to accept collect calls.

Sample of Fee Statement  
Letterhead/Logo

Date

Participant's name  
Mailing Address  
City, State, Zip Code

To facilitate registration for everyone, we request all fees be paid in advance. Listed below is a statement of the amount due for your class kit. In addition, any under/over payment is shown with an explanation.

Class Kit		\$_____
Check included in registration	\$_____	
Totally actually due	\$_____	
Difference (+ or -)	\$_____	
Explanation		
Total Due Now		\$_____

Please return this form with your check or money order made out to Seminar 20xx to

Registrar  
Mailing Address  
City, State, Zip Code

Please mail before \_\_\_date\_\_\_.

Sample of **Waiting List Letter**  
Letterhead/Logo

Date

Name

Mailing Address

City, State, Zip Code

Dear

We have had an overwhelming response to Seminar 20xx. We regret we are unable to place you in any of your class choices. Cancellations do occur, however, and we have established a waiting list. Your name has been placed on the waiting list. If you will accept other classes, you may call us and we will let you know what is currently available. If this is unacceptable, please contact us at phone number and we will refund your money immediately minus the non-refundable portion.

If we do not hear from you, we will continue to try to place you in the classes of your choice until two weeks before Seminar and then, if not successful, we will refund your money by \_\_\_\_\_.

Please be assured that we are doing all we can to accommodate everyone who wishes to come to Seminar 20xx. Thank you for your interest and your patience.

Sincerely,

NAME, Seminar 20xx Registrar

NOTE: It is probably wise to telephone the participant first. Overbooking should not be a problem with first day registrants.

## Sample of **Cancellation Letter**

Date

Name

Mailing Address

City, State, Zip Code

Dear \_\_\_\_\_,

We are sorry you had to cancel your registration to the Rocky Mountain Region, EGA Seminar  
20xx.

The registration fee which you paid, along with any kit fees, will be refunded to you minus the  
\$\_\_\_ non-refundable registration fee within two weeks after the close of seminar.

We regret that you will be unable to join us at seminar.

Sincerely,

NAME, Seminar 20xx Registrar