



SACUBO

**SOUTHERN ASSOCIATION OF COLLEGE
AND UNIVERSITY BUSINESS OFFICERS**

Drive-In Workshops

BEFORE THE WORKSHOP

- ❖ **Determine Your Potential Audience**

- ❖ **Determine the Length of Workshop and Potential Dates for your Workshop**

 - Check with peers and State Association meetings for best dates to avoid conflicts---or to coordinate training opportunities**

- ❖ **Identify Your Location and Possible Facilities**

- ❖ **Identify Topics and Faculty**

 - Coordinate with the Drive In Workshop Coordinator**

- ❖ **Contact Faculty (estimate costs)**

 - Book accommodation**

 - Arrange for travel to and from airport**

❖ **Check on Hotel/Conference Center Costs**

Facility costs

Food costs

Break costs

❖ **Prepare Budget for Workshop**

Fees are approved by SACUBO

\$95 for one day, \$125 one and one half day (Special Pricing Arrangements may be an option under some circumstances.)

❖ **Sign Contract with Facility**

Meeting rooms, A/V, room rates, food service

❖ **Confirm with Faculty**

❖ **Prepare Agenda**

❖ **Prepare Brochure/Template**

Secure biography, course summary and learning objective from presenter

❖ **Have Agenda and Brochure Approved to meet NASBA Standards.**

This should be done NO LATER than 6 weeks prior to your workshop date. Send to Lynn Butler, NASBA Coordinator, at lbutler@utdallas.edu for approval.

❖ **Once Approved, the brochure will be sent to the SACUBO Communications and Marketing Coordinator to post on SACUBO website.**

- ❖ **Lynn Butler, NASBA Coordinator, will provide an Excel spreadsheet to enter the registrants for the workshop once the brochure is approved and on the SACUBO website. She will also send you the CPE Forms, sign in sheets and the evaluation sheet approximately two weeks before the workshop begins.**
- ❖ **Review the “For the Workshop” list.**

FOR THE WORKSHOP

- ❖ **Establish Registration Process**
- ❖ **Prepare Name Tags**
- ❖ **Prepare Roster of Attendees Including Name, Title, State, Organization and Email Address**
- ❖ **Copy Presenter Handouts to be Provided to Attendees**
- ❖ **Make Copies of CPE Forms to be Provided – 2 per person so that they can keep a copy for their records**

❖ **Prepare Checks for Honorariums (\$500 per Faculty for an all-day teaching* or pro-rated accordingly) and Present to them along with a Travel Reimbursement Form at the Workshop**

***Special Honorarium Rates may apply**

❖ **Prepare Signs for Workshop Site**

Registration tables

Directional signs if necessary

❖ **A Double Sided Folder Works Well for a Workshop Packet:**

Suggestions for compiling packets:

On the left side:

Agenda

All Handouts

On the right side:

Roster

Evaluation

CPE Form

Note Pad – this was donated

Pen/pencil – this was donated

❖ **Introduce Speakers**

❖ **Housekeeping Announcement – CPE's, evaluations, cell phones, restroom, etc.**

❖ **Collect CPE Forms from Those Needing Credit**

❖ **Collect Completed Evaluation Forms**

AFTER THE WORKSHOP

- ❖ Compile and summarize evaluation forms and send a copy of the summary to Lynn Butler and the instructor(s) of the workshop.
- ❖ Settle Expenses
- ❖ Email CPE Forms, all handouts and sign-in sheets to Lynn Butler at lbutler@utdallas.edu. Once all CPE Forms, sign-in sheets and the Excel Spreadsheet have been received by Lynn, she will prepare the certificates and email them to each attendee.

❖ **Prepare Summary Financial Report and submit to:**

Lynn Butler

Drive-In Workshop Coordinator

The University of Texas at Dallas

800 W. Campbell Rd.

Richardson, Texas 75080

Instructions for surplus funds will be e-mailed after the Financial Report has been received.

❖ **Send Thank You Notes to Faculty**