

## TIPS FOR TIMELINE AND CHECKLIST FOR SPONSORING CLASSES

### Immediately

	Determine the interest to support a successful sponsorship experience
	Invite instructor to come and teach course and together decide on course dates
	Request brochure from Instructor listing course fees, pre-requisites, etc.
	Co-create a contract to be signed by both Instructor and Sponsor
	Use the Accounting form in Excel to set a preliminary budget including: <ul style="list-style-type: none"> <li>• estimate instructor's travel, lodging, meals</li> <li>• estimate administration expenses, including advertising</li> <li>• estimate space rental, supplies, snacks, manuals and certificates</li> <li>• estimate royalty and any required taxes (e.g. State Sales and Use Tax)</li> <li>• Instructor's minimum income and/or number of students for a viable course</li> </ul>
	List course on the Educational Kinesiology website
	Send out initial course information with invite to forward info to others
	Discuss Instructor's travel plans, accommodations & local transportation
	Procure location for course keeping in mind: <ul style="list-style-type: none"> <li>• space for seating and movement</li> <li>• quiet and well-ventilated</li> <li>• carpet preference</li> <li>• lighting-windows and incandescent lighting</li> <li>• snacks and water allowed</li> <li>• ample parking</li> <li>• accessible food establishments</li> </ul>

### Three to four months before course

	<b>Discuss terms of an agreement and how to get them into a written form</b>
	Continue updating income and expenses into the Accounting Form.
	Instructor and Sponsor communicate regularly about projected income and expenses.
	Request mailing list if needed from Foundation
	Compile contacts list and send out information
	Email or mail course brochure and registration form
	Promote course through other courses
	Remind other instructors to network and pass on the information
	Create a confirmation letter to registrants including: <ul style="list-style-type: none"> <li>• Registration fee received with amount due on first day of course</li> <li>• Dates &amp; times of courses</li> <li>• Directions to course and related transportation information</li> <li>• Lodging information</li> <li>• Restaurant suggestions/locations</li> <li>• Reminder to dress comfortably</li> <li>• Reminder to bring water bottle and to bring snack to share (optional)</li> </ul>
	When corresponding by email, ask for a response from registrant.

### Four to six weeks before course

	Continue updating income and expenses into the Accounting Form.
	Instructor and Sponsor communicate regularly about projected income and expenses.

**Reminder: It is highly recommended that Sponsor & Instructor have a written agreement.**

CheckListSponsorPack.doc

6/29/2009

- Sponsor and Instructor discuss adequacy of registrations/income versus expenses to hold the course.
- When course is canceled due to inadequate income or unforeseen circumstances, immediately contact registrants and issue refunds.
- Confirm adequacy of course space for enrollment and adjust as necessary
- Communicate who is going to order the manuals and certificate
- Instructor provides Sponsor with handouts to be duplicated, special materials, etc.
- Make or confirm lodging and other travel arrangements
- Email course information once more
- Bookkeeping:
  - Create a roster with each student's name, address, phone and email
  - Record check numbers and amounts
  - Chart fees to collect on first day of course
- Instructor and/or Sponsor create a welcome letter for Sponsor to send to students a couple weeks before the course. This letter includes welcome, directions, dates and times, what to wear, what to bring (snacks, assignments, other manuals/books).

**First day of course preparations**

- Name tags and markers
- Easel, flip chart and non-toxic markers
- Tape - safe for walls
- Paper
- Crayons/colored pencils/markers
- Scissors
- Tape/CD player
- Extension cord
- Massage table, if needed
- Instructor materials list
- Food: Participants may bring snacks to share or sponsor provides nutritious snacks
- Water (Bottled or filtered)
- Prepare roster for proofreading by participants
- Prepare receipts for each participant

**During the course**

- Arrive early to set up room with Instructor
- Handle registration, collect fees, record check numbers and amounts
- Maintain teaching space and assist Instructor when requested
- Distribute roster & receipts to students
- Finalize course financial bookkeeping on the Accounting Form
- Both instructor and sponsor sign and date the following information/documents:
  - Accounting Form as receipt of payments
  - Receipt of payments to/from instructor and/or sponsor
  - Decide who is responsible for paying the royalty or outstanding bills

**After the course**

- Mail roster and royalty to the Foundation
- Optional – send friendly email to participants

**Reminder: It is highly recommended that Sponsor & Instructor have a written agreement.**

CheckListSponsorPack.doc

6/29/2009