

Guidance for SHIBA Sponsor Hosted Trainings

The following is guidance on the process for offering to host Regional New Volunteer or Master Class training.

1. Communicate with the state office on availability of training dates at least three months in advance of desired training
2. Research availability / reserve room(s) for possible dates
3. Create a flyer two months in advance of training date (once dates are set and room is reserved) with: date, time, address of training, and registration process
 - a. Determine registration process (phone and/or email for registration)
 - b. Distribute flyer to SHIBA sponsor network
 - c. Distribute to community partners / local agents as space allows
 - d. Send flyer to the State office so they can put it on the SHIBA website
4. Research refreshment options (self-catered or through established provider), striving to stay within \$10 per person/per day for morning, lunch, and afternoon refreshments if possible
 - a. Inquire with attendees of any dietary restrictions
5. Determine refreshment vendor / order three weeks prior to training
6. Determine if the vendor can be paid via credit card (step 7) or we will need to cut a check (step 8)
7. Payment via credit card (**preferred method**):
 - a. Obtain a quote and at least one week prior to the event send the quote to your Field Officer for review
 - i. When the quote has been reviewed the Field Officer will send quote on to Dawn Shaw for approval
 - ii. Dawn will contact the vendor to arrange for payment
8. Payment via check:
 - a. Submit the following at least two weeks prior to the training to your field officer:
 - i. Refreshment estimate or quote which includes:
 1. Company name, address, phone, email and EIN and BIN
 2. Itemized list of what is being purchased
 3. Cost per person by day and, if more than one day, total for all days
 - ii. Training announcement flyer
 - iii. Attendee list, allowing space for additional late registrations
 - b. Note: payment cannot be sent to an individual. , If purchases are made by an individual the sponsor site will need to invoice the state office for reimbursement.
 - c. STATE OFFICE – Enters data into the state’s procurement system to create a Purchase Order (PO)
 - i. The caterer should receive a copy of the PO to bill against after the event
 - d. Confirm with the caterer one week prior to training date the actual head count, refreshment order, delivery times, location, etc.
 - e. Caterer bills the state directly referencing the PO number, after the event.
9. Day of training –
 - a. Arrive at training site 30 minutes in advance of training start time
 - b. Allow more time to set up tables and chairs (if necessary)
 - c. Set up morning coffee, tea, lunch area
10. Return room to required configuration at the conclusion of training