# smps®

## chapter
## management
## manual

**EDUCATION,
PROGRAMMING, &
CERTIFICATION**

**2020–21**

# SMPS MISSION

**To advocate for, educate, and connect leaders in the building industry.**

# SMPS VISION

**Business Transformed through Marketing Leadership.**

Our vision is for firms to execute marketing principles (research, strategy, branding, communications) to drive business decisions and pursue work that aligns with their brand, which will result in profitable operations and a respected market position.

**What does "business transformed" mean?**

- Being able to clearly define and communicate what sets your firm apart

- Understanding the important balance between marketing and business development

- Helping our members anticipate and navigate the trends and challenges on the horizon

- Operating your business like it's not business as usual

# SMPS DEI PHILOSOPHY & POLICY

SMPS recognizes, respects, and values the dignity of all people. We are united in our stance against all forms of injustice and inequity. SMPS commits to actively champion diversity, equity, and inclusion (DEI) within our organization, the firms we represent, the communities we serve, and the architecture/engineering/construction (A/E/C) industries. We are intentionally working to increase participation in our organization and the A/E/C industries by underrepresented groups; advocate for recruitment and retention of professionals of all backgrounds by creating inclusive and welcoming environments; and promote equality and opportunities for advancement in the Society and industry overall. Together, we can transform our businesses, enhance membership experiences, and influence change in our communities.

We recognize that our diversity is reflected by our different people and firms. We believe our varying ethnicities, cultures, genders, sexual orientations, ages, levels of experiences, physical abilities, and other differences benefit us as individuals and as an organization. In SMPS, we will organize and promote programs and activities that espouse our beliefs and increase awareness, understanding, recruitment, and participation of diverse persons and firms.

# chapter management manual

# EDUCATION, PROGRAMMING, & CERTIFICATION

**smps**

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# INTRODUCTION

This section will walk chapter leaders through educational program planning, certification, and regional conference support.

# PROGRAMMING

To make this process easier for chapter boards, the process of planning educational events has been split into the following steps.

## Step 1. Assemble the Program Committee

Just like any other work you do, the first step to planning a successful educational program is to identify members who can help accomplish the many tasks.

### Select a Chairperson

It is critical for the chapter leaders (usually the president and/or president-elect) to select an education chair as early as possible. This person assumes oversight over all aspects of the chapter's educational programming and delegating responsibilities to individual team members. The education chair should work closely with the president and president-elect to ensure programs align with the chapters strategic goals.

### Assemble the Team

The education chair should attempt to secure enough volunteers to cover all tasks associated with a successful program. Depending on the size of the chapter and number of programs, the size of the team may vary. It is recommended that the team include the following positions:

- **Education Chair.** Overall responsibility for the chapter's educational programs; reports to the chapter president; builds and maintains the team; develops the budget; approves expenditures; evaluates the program and communicates lessons learned to the chapter leadership; recognizes and rewards the volunteers.

- **Registrar.** Receives registrations and payments; prepares a list of who is attending the seminar; provides SMPS with roster of attendees; responsible for reproducing an appropriate number of seminar manuals and other materials prior to the seminar; coordinates check-in of attendees at the seminar; records attendees.

- **Finance Chair.** Keeps track of the money; receives payments from the registrar and deposits money into the chapter's treasury; pays bills; prepares and issues invoices; collects payments for purchase orders and training forms; prepares and submits a final report.

- **Logistics Chair.** Works with the hotel or host facility to coordinate the seminar room, audiovisual equipment, and refreshments; reviews and approves hotel and catering bills.

## 1. SMART PRACTICE RECOMMENDATION

The fiduciary responsibilities of your chapter are taken very seriously. Financial transparency is vital to a healthy chapter. It is, therefore, extremely important to separate the registrar and finance chair tasks. Different people should be responsible for the sensitive tasks of handling people's (and your chapter's) money. Separating the tasks will serve as a check and balance against potential impropriety and give your chapter leaders peace of mind.

- **Publicity Chair.** Publicizes the event to the chapter and local community; writes for the newsletter and website; prepares and distributes brochures; issues press releases; coordinates with news media; displays SMPS promotional material at the seminar.

- **Program Chair.** Selects and coordinates the speaker(s); prepares an agenda; acts as master/mistress of ceremonies; introduces speaker(s); presents speaker gift(s).

The reality is you may not find enough volunteers to fill your team in this manner. Emphasize that any help is welcome, even for the smallest of tasks. One hour of their time on the morning of the seminar to help check in attendees is terrific! Also, don't allow yourself to become overwhelmed and feel that you must do every task suggested above. Remain realistic and stay within your budget. In most cases an extravagant host site, gourmet refreshments, a multitude of speakers, and a CD-ROM and/or program binder are not necessary.

The secret to success is having a plan for the work and then working the plan. Apply sound program management discipline; develop a milestone schedule and budget. Spread the work across as many volunteers as possible, but make sure you know who is committed to doing which tasks. Remind your volunteers to be realistic in the amount of time they can devote to the program and not to over commit.

## Step 2. Develop an Education Plan & Identify Topics

Each chapter differs based on it's location, market conditions, size, mix of members, and other dynamics. It is important that you and your board examine the composition of your chapter (age, experience, market affiliation, role in the firm, etc.) and develop educational programming that meets the needs of all your members. There are several effective ways of identifying the educational needs of your members:

- **Discussions with Key Individuals.** Key individuals can be board members from your chapter, management of members' firms, or well-known professionals in the A/E/C industry. Keep it simple—phone calls or e-mail messages are sufficient. Ask what business challenges their firms are facing, industry trends they are tracking, or social, economic, and political changes to which they are adapting.

- **Literature**. Review the current SMPS Chapter Education Report, monitor professional journals, newsletters, trade magazines, newspapers, and online blogs to identify current issues, future trends, and potential speakers.

- **Questionnaires or Surveys**. Send a short questionnaire or survey to the members and nonmembers of your chapter. Ask what the top issues are for professional service marketers and what issues they'd like the chapter to address.

**2. SMART PRACTICE RECOMMENDATION**

The most successful chapters include programs focused on both junior and senior levels as well as addressing the needs of both marketing and business development. Creating a healthy chapter with a diversity of members is supported by education programming. Chapters who offer only basic education on marketing will not attract senior- level principals or business developers. Include a mix of senior and junior marketing and business development expertise on your chapter programming board so all member constituents will be served.

- **SMPS Learning Labs.** The very popular SMPS Learning Labs are a FREE member-only benefit that are aimed at the core member demographic. Every webinar is recorded and available in the Learning Lab folder in the MySMPS Marketing Resource Center after each program, along with handouts. You can repurpose these recordings providing an opportunity to meet in-person. Chapters may not charge a fee for the Learning Lab recordings as they are a FREE member-only benefit.

- **Evaluation Forms.** Make sure an evaluation form is available at each educational program your chapter hosts, ask attendees to list the top three issues they're facing right now.

Once you have a good idea of what the needs are among your members, you are then ready to choose appropriate topics for your educational programs. When starting to plan your programs, think about the different formats for programs—workshops, lectures, panels, multi-day, half-day, etc. Different topics may lend themselves to different structures. For example, a session on developing a marketing plan would be most effective in a "hands-on" workshop rather than a lecture based program. In your planning, also focus on delivering education to all levels of experience in your chapter. A sample education planning checklist, that will outline a timeline for your program, can be found in the MySMPS Chapter Leaders Library.

## Step 3. Invite Speaker(s)

Selecting speaker(s) can be a challenging task. There are numerous sources for identifying speakers:

- **Discussions with members.** Talk with members and board members to identify local speakers. This provides an excellent source for putting together panel discussions on local topics (regional development, state/local construction plans, etc.)

- **Evaluation results.** Review evaluation forms from previous chapter programs for names of speakers recommended by members.

- **Other chapters and SMPS regional conferences.** Contact other chapters and regional planning committees for suggested speakers that have been well reviewed.

- **SMPS Board of Directors.** SMPS Board members may be available to conduct industry programs for your chapter. Contact Tina Myers at tina@smps.org for details and availability.

- **Contact SMPS HQ Staff.** SMPS maintains a list of speakers who are available to speak on a variety of topics.

- **Chapter Education Report.** Each year SMPS chapters submit a report of all their chapter programs for the year. These reports are compiled into the Chapter Education Report. The report lists programs organized by chapter and Domain and is available in the All Chapter Leaders Library. The report provides specific details about each event: pricing, attendance numbers, speaker details, program description, evaluation score rating. A sortable version is also available.

**3. SMART PRACTICE RECOMMENDATION**

It is a good idea to have your speaker(s) sign a statement that addresses copyright and certifies that the material they are presenting is their own, came from the public domain, or they have written permission to use it for your program. Copyright is a form of protection provided by the laws of the United States (title 17, U.S. Codes) to the authors of "original works of authorship," including literary, dramatic, musical, artistic, and certain other intellectual works. There are many templates available for your chapter's use that are available to the public via the Internet, libraries, etc.

- **Build Business Conference Submissions.** Each year, SMPS receives many more session proposals for Build Business than can be programmed into the conference. Unused sessions are compiled into a report available in the All Chapter Leaders Library. Once you have identified a potential speaker, you should evaluate his/her expertise and ability to speak. Here are some key points to help evaluate speakers:

  - ☑ Command of Subject Matter. The instructor should have content expertise. While this is important it should not be the sole reason why an instructor is chosen.
  - ☑ Willingness to Teach. While someone may have a command of the subject matter, this does not mean that he/she enjoys teaching and is willing to put forth effort to create a memorable learning experience for the participants. Ask the potential instructor to provide you with a list of programs that he/she has taught. This is a good indicator of an instructor's interest in teaching and presentation experience.
  - ☑ Effective Interpersonal Skills. The ability to read and react to the audience is a prerequisite for a good communicator. An effective instructor is most concerned with what the audience is learning rather than his/her ego.
  - ☑ Effective Listening Skills. A good listener uses reflective listening techniques before responding to a question from the audience. This ensures that the instructor understands what is being asked and provide validation to the learner.
  - ☑ Use of Sound Instructional Methods. People learn more when they are actively involved. Find out what teaching methods the instructor uses and how he/she uses audience involvement.
  - ☑ Willingness to Improve. If you are using an instructor on an ongoing basis, it is important that the instructor has the willingness to improve. Based on evaluations from the participants, audience comments, and your observation, make suggestions for future learning activities.

  **IMPORTANT:** To finalize the process of selecting a speaker, you should have them sign a speaker agreement that outlines deliverables, timeline, program date/location, and what expenses will be covered (if any).

## Step 4. Set the Program Structure and Format

An important step in developing your program is to understand the needs of your audience, clearly outline the program content and learning outcomes. This will assist in marketing the program, ensure the speaker(s) focus on the content to be delivered, and that attendees will understand what to expect from the program.

### Learning Outcomes

The first step is to identify the learning outcomes. Learning outcomes are statements that specify what learners will learn or will be able to do as a result of a learning activity. These encompass knowledge, comprehension, application, analysis, evaluation, or synthesis.

Learning objectives accomplish the following:

- Focus on a learner's behavior that is to be changed.

- Serve as guidelines for content, instruction, and evaluation.

- Specifically identify what should be learned.

- Convey to the learner exactly what needs to be accomplished.

Learning outcomes are truly learner-centered, observable, measurable actions by the learner. Learning outcomes contain three elements.

1. Who is to perform

2. What actions they are to take

3. An outcome that must result from their action

A sample learning outcome would be:

Participants will identify the key elements of an effective press release.

| who | action | | result |

Some additional examples of learning outcomes are:

1. Workshop attendees will create a blueprint for a marketing plan for their companies.

2. Participants will discuss ways that technology is impacting the marketing of professional services.

3. Learners will define the elements of an RFP and write a sample RFP.

It is important to use action verbs when writing learning outcomes. Some of the most common verbs are used:

| define | summarize | create |
|---|---|---|
| describe | demonstrate | explain |
| identify | examine | generate |
| write | interpret | develop |
| distinguish | use | discriminate |
| discuss | analyze | prepare |
| explain | differentiate | interpret |

## Program Content & Instructional Methods

Ensure content and instructional methods are appropriate for the intended learning outmodes. Ask the instructor for a detailed outline of the educational program including instructional methods that will be used. Content should be organized in a logical manner with learner interaction built in to reinforce learning. You should also look to see that the three types of learning styles are incorporated into instruction. These include:

- Auditory Learners: These individuals learn best through listening. Some suggested instructional strategies are lectures, panels, discussions, and asking questions.

- Visual Learners: These individuals learn best through observation. Demonstrations, PowerPoint slideshows, writing on a white board or flip chart, and videos are some ways to meet their needs.

- Kinesthetic Learners: These individuals learn best by being physically involved. Some examples are taking notes, participating in a round-table discussion, working in a group, and role-playing.

## Engagement Strategy

A program engagement strategy defines what should take place before, during and after an educational program.

For example:

- Before includes: informal discussions with registrants (face- to face or virtual), knowledge assessments and the opportunity to express learning goals.

- During includes: a focus on learning concepts, poll, Q& A and live chats, and the opportunity for attendees to share personal experiences.

- After includes: survey, assessment and certificates, continued discussion between attendees and instructor(s) and the opportunity to share real-world applications.

## Room Setup

Your room setup is the body language of your event experience. For example, when you enter and are seated in a movie theater style, in rows of seating facing forward, this setup subconsciously tells your mind, no interaction, just sit and be entertained. Be sure to align your program outcomes with your room setup. If the program encourages discussion, make sure that your room setup promotes that activity by using rounds, or pods.

# Step 5. Select Date and Location

## Select a Date

Picking a date for your seminar should be given serious consideration. The following questions will help you identify the best possible date to hold your program.

- **What month do we want to hold the seminar?** You need to start with a large target and narrow dates down as you ask the subsequent questions. Pick a month that on the surface appears to work with your chapter's program schedule. Summer months (from late June through August) can be a challenge as this is the peak time for family vacations.

- **Will the weather impact the event?** Think about whether the weather will create undue risk for your program. Don't schedule the program during times of the year when weather may force you to cancel the program or make it difficult for participants to attend.

- **Is the date near a holiday?** Allow several days before and after holidays for people to get back to work. You should avoid major holidays (New Years Day, Memorial Day, Labor Day, Thanksgiving, Christmas, etc.) by as much as a week or more as people tend to take vacations then.

- **When is your preferred speaker available?** Contact the instructor and ask for several dates that he/ she is available for the program. The more flexibility you have, the greater the chance that you will get your speaker of choice.

- **Are there any events competing for your members' time or money?** Review industry calendars (SMPS, AGC, AIA, etc.) to identify any events that may be within a few days of your preferred date. Also be aware of community events (festivals, parades, local celebrations, etc.) that may affect your registration numbers.

- **What day of the week is best?** Your chapter may already have a preferred day of the week for your events. Research among associations indicates that the best days, in order, are Wednesday, Thursday, Tuesday, Friday, and Monday.

- **When is your preferred facility available?** Most chapters tend to conduct their events at a favorite location. When considering dates, check with your contact at the facility to ensure the date is open. Many facilities offer "Value Dates". These are the days they are usually at their slowest and offer better incentives to have your business. Once the date has been agreed upon by the chapter, speaker, and facility, request a contract from the facility to formally secure the space.
- **Is there enough time to plan and market the event?** You should develop a plan for your team that can be realistically accomplished. The plan should work back from the event date and include sufficient time for the speaker to develop the program, the communications committee to market the program, and members to add it to their calendars.

## Select a Location

There are many factors to consider when selecting the location for your program. Here are some questions to consider when selecting a facility:

- Are the room, A/V, food, and beverage costs within your budget? (Ask for banquet menu and start pricing out event F&B, remember to add tax and service charge—approx. 31%, to final total)

- Is the location convenient for the majority of your members?

- Is this a desirable, comfortable, well maintained facility? (Make time to visit all properties in consideration)

- Can the facility accommodate the number of people you expect to attend?

- Are you going to have to cut off registration and lose revenue or do you have the flexibility to exceed estimated attendance?

- Is there convenient parking and/or public transportation nearby?

- Is this a facility that can accommodate all of our chapter programs (board meetings, holiday party, networking events, etc.)?

It is common to hear problems with seminar arrangements because of poor contracting practices. Once you have selected your location and settled on a date, it is important to execute a signed contract or BEO (banquet event order). Most hotels, caterers, and meeting facilities use standard forms. Review these forms carefully as they are written for the host facility and will generally favor them. Feel free to question and negotiate the terms, conditions, and clauses that you do not understand or are not comfortable with. If you have questions about any contracts you're being asked to sign, the SMPS Knowledge and Profesional Development team can help answer questions you have. It's important to note, however, that the contract is between the facility and the chapter—SMPS HQ is not involved in nor responsibile for the contract.

**4. SMART PRACTICE RECOMMENDATION**

Ensure that whomever signs the contract is authorized to sign on behalf of the chapter; refer to your chapter bylaws for guidance. The person who signs the contract should also be the only one authorized on behalf of the chapter to make changes to the contract. Some chapters have had trouble with multiple people making changes to the contract/BEO on the day of the event, which can have a significant impact on the event expenses. The logistics chair and finance chair will need copies of the signed contract. If anything is disputed or not delivered, the contract will help resolve any disputes.

## Step 6. Determine CEUs and AIA LU Hours for Your Program

SMPS awards Continuing Education Units (CEUs) for the purpose of recertification for Certified Professional Service Marketers. We expect the chapters to touch on each of the six domains at least once during the programming year. It is recommended that you include the SMPS CEU and AIA LU logo (if you're offering AIA credits) on your marketing materials to attract those seeking these credits.

### CEUs

One continuing education unit (CEU) is awarded for each contact hour of instruction. A contact hour is defined as one hour of interaction between a learner and an instructor. For purposes of calculating CEUs, breaks, meals, and social/networking time cannot be included in the contact time.

A function with less than one hour of contact time is not eligible for CEUs. For functions with more than one hour of contact time, the minimum increment of contact time eligible for CEUs is 15 minutes, which cannot be rounded up to the next greatest interval. A presentation during a meal function can be counted for the length of the presentation only. Meeting time devoted to business and committee activities cannot be counted.

### AIA LUs

All SMPS chapter provider accounts are now under the SMPS HQ provider number.

If you are not already an AIA CES Provider, you will need to complete the AIA CES Provider application at https://www.aia.org/pages/2686-become-a-continuing-education-provider and note that you are an SMPS chapter on the application.

## Step 7. Develop a Budget and Set a Price

One of the most critical aspects of program administration is developing a budget. The first step is to identify all the costs associated with the program, these can include:

- Speaker fees and travel expenses
- Food and beverage costs
  (Is the F&B minimum requirement manageable, even with less than expected attendance?)
- Tax, service fees, and gratuities
- Room rental and A/V costs
- Marketing costs
- Fees for processing registrations
- Event signage
- Handouts

**5. SMART PRACTICE RECOMMENDATION**

Sponsorship is an excellent way to add additional revenue to the event. Find a local vendor whose products are used by many members of your chapter. Ask the vendor to sponsor a coffee break or lunch. Highlight this sponsor in your program materials and with a sign in the registration area. You can offer sponsors who provide significant support a table for them to display their products or services, offer them a complimentary registration or invite them to spend one-on-one time with the speaker.

There are a number of ways to minimize event expenses. Using a local speaker or a volunteer speaker will eliminate your speaker fees. One of the largest expenses associated with an event is food and beverage. You can cut some of your food and beverage costs by not providing a coffee break or by having attendees be responsible for lunch on their own expense. If you are providing a continental breakfast, it is typically less expenses to order pastries by the dozen rather than to order the per-person continental breakfast on the menu. Another money saver is to offer a plated lunch (if you are providing one) over a buffet. Also, be sure to factor in taxes, service charges, and gratuities. It's not uncommon to pay 30-40% on top of your food and beverage costs. These costs should be factored in when developing the budget.

Once the expenses have been determined, you can begin to discuss how much to charge for the event. Generating a profit for the chapter should be a goal, so factor in how much net profit you plan to make. For example, if you have $1,000 in expenses and want to make a net profit of $500, you will need to collect $1,500 in revenue. If your goal is to attract 50 attendees, you will need to charge $30 per person. It is important to estimate your expenses and have a registration goal before determining the registration fee.

An important consideration when setting your registration fee is to know what your local market will bear. What are other associations charging locally for similar programs? How much have you charged in the past? It is highly recommended that you conduct some market research to document what other associations, colleges, and professional training organizations charge for similar programs. You do not want to charge more than the market rate, but don't under-value the quality of the education you're providing.

You should also take into consideration the type of program you are offering. The registration fee for a 90-minute seminar will be less than the fee for a full-day course. Non-members should be charged a higher rate than members to create member value, but not so much to make it cost prohibitive for non-members. Your target audience is also a consideration. Senior level executives have access to larger training budgets than newly hired marketing coordinators.

## 6. SMART PRACTICE RECOMMENDATION

As with marketing your firms, use a marketing mix that uses a variety of methods to publicize the event. Not all of your members and nonmembers receive information in the same way. Make sure you touch them in a variety of formats (electronic, print, personal outreach, etc.) to reach as many potential attendees as possible. When developing your marketing plan, also make sure not to bombard members with too many messages. Make sure you're not overwhelming them with repeated e-mail messages or sending multiple communications at the same time.

## Step 8. Market the Program

Promotion for your program should begin as early as possible. There are a number venues to promote your educational event including:

- **Advertising in Chapter Newsletter.** Create an attractive ad that provides potential attendees with the basics of the program: title, date, location, price, why they should attend, a contact name with phone number/e-mail address, and where to find additional information.

- **Press Release.** Issue a press release several months before your program to local and topic-related press.

- **Flyer at Chapter Events.** Distribute a flyer at all of your chapter events leading up to the program.

- **SMPS Calendar.** SMPS HQ maintains an online calendar of events on the website and the MySMPS Community at www.mysmps.org. Adding your event to the SMPS calendar will promote the program to the entire SMPS community, including your neighboring chapters.

- ***SMPS Marketer QuickLook.*** Submit your event for inclusion in the SMPS monthly e-newsletter. If you would like your event added to Marketer QuickLook, please e-mail marketing@smps.org.

- **Cross Promotion with Other Associations.** If there are other related professional associations in your local market, you can ask them to promote the meeting to their members. Establishing a relationship with other groups for the purposes of cross-promotion can be extremely resourceful and could eventually lead to increase membership in your own chapter.

- **Brochure|Postcard.** Create a brochure or postcard highlighting your event. As marketing experts, you know the guidelines for creating a high-quality brochure or postcard for your companies. Apply the same principles to your program brochure. The rule of thumb for mailing the piece is 10-12 weeks in advance of a state/regional program and 6-8 weeks in advance for a local program.

- **Personal Contact.** Smaller chapters may want to make personal phone calls to each of their chapter members inviting them to attend the upcoming event. Enlist the help of other chapter officers by splitting up the list of chapter members and having each person make some calls each week.

> **7. SMART PRACTICE RECOMMENDATION**
>
> Your programs are an excellent place to promote all the services and benefits that SMPS offers members. Contact SMPS HQ for updated information on SMPS education programs, Build Business, SMPS regional conferences, and membership benefits. Identify nonmembers who attend and designate a board member who can introduce themselves to each nonmember. Have membership information on hand in case anyone is interested in joining.

## Step 9. Finalize Event Logistics

### Monitor Attendance and Resource Levels

Once you start receiving registrations, your chapter needs to closely monitor how many registrations it has and how many you reasonably expect to receive. Monitoring attendance helps you ensure a positive attendee experience by ensuring ample handouts are available, enough seating is provided, and the right amount of food and beverage is ordered.

Most catering agreements allow you to adjust your food order prior to the event. You can usually increase without financial penalty, if done in a timely manner; however, you often cannot decrease your food commitment without penalty. Thus, you will need to monitor your attendance, be conscious of deadlines with caterers and facilities, and weigh your options for adjusting orders for food and space against any additional fees for doing so.

### Create Supplemental Materials

Once you have decided which materials to use and what format they will be in, you will need to reproduce those for your seminar attendees. It is important that whoever has been delegated this responsibility is in communication with the registrar. You want to make sure to have enough copies of the material available for each registered participant, plus a few extra for any walk-ins you may have the day of the program. It is also a good practice to produce a copy for the speaker(s) and at least one extra copy for historical purposes. Monitor how many handouts are being produced, however, as producing excessive handouts can eat into your profit margin.

Evaluating your program is an important step in monitoring how well you are meeting the educational needs of your members. Chapters may reproduce this form and distribute it at their programs. Using a consistent evaluation form will allow you to benchmark programs against each other.

Minimally, evaluations should answer the following questions:

- Did the program accomplish what was planned?
- If the program did not accomplish what was planned, where did it fall short and why?
- How should the program be revised if it is offered again?
- What topics are you interested in learning about at future events?

Prior to the program, you will also want to create certificates of attendance for each of the participants for their records. This is particularly important for CPSMs. They can submit this form with their recertification packet. Therefore, it is important to include the number of hours and CEUs on the certificate. Additionally, you will want to produce and print out program evaluation forms and CEU forms.

### 8. SMART PRACTICE RECOMMENDATION

Once you have thanked your volunteers and speakers, finalized your registration list, and paid all the bills, send a copy of the registration list to SMPS HQ. The SMPS Membership Department will identify nonmembers on the list and follow up with them to reinforce the benefits of membership. A good experience at a chapter educational event will make the nonmember more receptive of membership and the benefits of joining SMPS.

# Step 10. Conduct the Program

Approximately one to two weeks before the scheduled program, review the items below to ensure everything is covered and all goes smoothly on the program day.

1. **Review room setup and equipment.** Have you arranged for the hotel/conference center or your own facility to set up the meeting room according to your specifications (e.g., lecture hall style, classroom, table rounds of eight, etc.)? Have you reserved or obtained the necessary audio-visual equipment for the presentation (e.g., PowerPoint projector, screen, microphones, etc.)?

2. **Greet speaker(s).** Be sure to make your guest speaker(s) feel right at home. Decide who will meet them and make sure they're comfortable with the room setup and audio-visual arrangements. Make a badge for the speaker.

3. **Check in attendees and distribute program materials.** It's convenient to set up a table by the entrance to the meeting room where one or two chapter volunteers can welcome the attendees and check off the roster. This station also serves as a central point to answer questions and provide information for your guests.

4. **Network.** Each program is not solely an educational session. It's a wonderful opportunity for your members and guests to meet each other, catch up on the latest news, and welcome new members into your chapter. As chapter leaders, encourage more involvement and interaction among your guests. Breaks throughout the day provide the perfect occasion for networking.

5. **Make announcements.** Determine the best time to make your general housekeeping announcements. Perhaps after lunch, between speakers, or before a break. Announcements should be brief, but be sure to recognize sponsors and board members, promote upcoming events, and remind attendees to silence their cell phones.

6. **Introduce speaker(s).** Decide who will welcome attendees and introduce the instructor(s) to the audience. Some speakers like to mingle with the audience before the program starts to get a sense of who is in the room or to network. You may want to ask the speaker(s) if there is anyone in particular to whom they'd like to be introduced. It is also a good idea to introduce the speaker(s) to the chapter president or other board members. They are often very appreciative of the invitation.

7. **Schedule breaks.** As mentioned earlier, breaks provide the perfect opportunity for networking. Equally spaced throughout the session, they'll also keep the participants sharp and focused on the material.

8. **Collect evaluation forms and distribute certificates of attendance.** Following completion of the seminar, ask the attendees to complete the evaluation form and distribute the certificates of attendance to your guests. Again, advance planning pays off; be sure to prepare these forms ahead of time.

## Step 11. Recognize Volunteers and Speakers

This is the last step in the process, and it is the most often overlooked step as well. To this point, your program has been successful in large part to the hard work of your volunteer team and the skill of your speaker(s). Don't forget to thank them!

### Recognize and thank the speaker.

It is customary to provide a small but meaningful gift as a token of your appreciation to the speaker. Cost is not the most important consideration when selecting a gift; something that brings your chapter or area to mind works well, like a framed picture. If you want to make a donation to an organization on the speaker's behalf (such as a favorite charity or the SMPS Foundation), it is best to ask the speaker for their approval before announcing the donation. Don't forget to publicly thank the speaker for the presentation, and follow up within a couple of weeks of the seminar with a written note (instructors may need the written letter for recertification credit or for continuing education credits).

### Recognize and thank the volunteers.

Chapter volunteers donate their time and energies to make your program successful. It is customary to recognize them individually; small gifts, like pen sets or gift certificates, work well. However, many volunteers are quite satisfied with less tangible recognition such as publicly introducing and thanking them at the seminar and putting their picture and a write-up in your chapter newsletter or on the website. Follow up within a couple of weeks following the seminar with a written note (volunteers also may need the written letter for recertification credit or for continuing education credits).

# STANDARDS FOR LEARNING

Learning is a process and not the result. The amount of energy placed on "what" should be learned must be equal to "how" it should be learned. We want to move from acquisition of information to engaging knowledge transfer.

## Principles of Adult Learning

An understanding of the following is critical to the development of any educational program:

- Adults are autonomous and self-directed.

- Adults bring knowledge and experience to each activity.

- Adults need learning to be relevant and practical.

- Adults are goal-oriented.

- Adults are problem-oriented and want to apply what they've learn.

- Adults are motivated by intrinsic and extrinsic factors.

- Adults have different learning styles (visual, auditory, kinesthetic).

## Our Learning Commitment

- SMPS will provide opportunities for participants to direct their own learning.

- SMPS will incorporate learning activities to touch each learning style.

- SMPS will balance how content is presented.

- SMPS will provide clearly defined learning objectives.

- SMPS will utilize a variety of assessment techniques.

- SMPS will be impartial in selecting programs and speakers.

- SMPS will provide content that can transform businesses and support professional development.

# SMPS REGIONAL CONFERENCES

SMPS regional conferences offer innovative education and valuable networking opportunities. They provide an opportunity for leaders from multiple chapters to forge relationships as they work together to deliver valuable education and networking programs for members.

SMPS regional conferences have grown in number, size, and popularity, proving that they are an excellent way of supporting SMPS members and the SMPS mission of advocating for, educating, and connecting leaders in the building industry. These regional conferences have been well received by the attendees and have generally operated successfully, both in terms of value delivered to the attendees and participating chapters, and from a financial perspective.

## SMPS HQ Support

SMPS offers several means of support for SMPS regional meetings: speaker(s), marketing, sponsorship, giveaways, and much more.  To receive this support, however, the regional must meet the qualifications of a regional meeting. SMPS defines a regional conference as a multi-day (1.5–2 days) educational event hosted by three or more chapters. Each chapter must participate equally in the planning and execution of the conference, share fiscal responsibility, and sign the agreement between chapters.  The conference should offer a keynote session(s),  breakout sessions and one or more networking events. If your regional conference meets this criteria, you will have access to SMPS HQ support.

# CERTIFICATION: CERTIFIED PROFESSIONAL SERVICES MARKETER (CPSM)

When you sit for the Certified Professional Services Marketer (CPSM) exam, you are taking your first step toward joining a distinguished group of professionals committed to pursuing knowledge, building their businesses, and advancing their careers.

## Talking Points:

CPSM designation offers these important benefits:

- Increased knowledge of strategic marketing research and planning, client development, and organizational management.

- Industry recognition of your professional competence. Nearly 60% of respondents to the 2015 Value of CPSM report that recognition from their firms is a direct benefit of earning the CPSM!

- Enhanced credibility with employers, clients, and peers. Nearly 80% of respondents to the 2015 Value of CPSM report that recognition from their firms is an indirect benefit of earning the CPSM!

- Improved ability to compete in the job market.

- Potential for increased compensation and benefits. SMPS Marketing Compensation and Metrics Survey shows that marketers and business developers with the CPSM designation show an increase in compensation by as much as 30%.

- Opportunities for career advancement.

## Application and Eligibility for CPSM Exam

The CPSM is open to all candidates who meet the eligibility requirements below. SMPS certification is the model of excellence for our profession; qualifying for it demonstrates your pledge to excellence as well.

## Eligibility Requirements

To sit for the CPSM exam, candidates must be proficient in the knowledge and skills identified in the SMPS Domains of Practice for Professional Services Marketers. Each candidate must meet the following requirements:

- possess a bachelor's degree or an advanced degree plus four years of experience in marketing or business development for firms providing professional services, or

- possess an associate's degree plus six years work experience in marketing or business development for firms providing professional services, or

- without a degree, have eight years of experience in marketing or business development for firms providing professional services.

    In addition, all candidates must:

- pledge to abide by the CPSM Code of Ethics

## Application Process

**Step 1.** Complete and submit the online CPSM application form and application fee to Professional Testing Corporation (PTC). Include a copy of your college transcript, or a notarized photocopy of your degree (when applicable).

**Step 2.** The application will be reviewed, and candidates will receive their scheduling from PTC within two weeks. Candidates will have one year from the date the scheduling authorization is issuedto sit for the exam. (If you do not receive your scheduling from PTC within two weeks, contact PTC at 212.356.0660 for a duplicate.)

**Step 3.** Refer to your scheduling notice from PTC for details on how to schedule your examination appointment at a Prometric testing center. Appointment times are first-come, first-serve, so schedule your appointment as soon as you receive your scheduling notice to maximize your chance of testing at your preferred location and on your preferred date. You have one year from the date your application is approved to take the test.

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