



MPI<sup>®</sup>

**CHAPTER EDUCATION**  
TOOLS & RESOURCES

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# CHAPTER EDUCATION TOOLS AND RESOURCES

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**MATERIALS:** MPI wants to make it as efficient as possible for you to host engaging and thoughtful (and profitable) learning experiences at your chapter. Herein find resources that will help you do just that. From speaker checklists and best practices to a coaching call how-to, discover the tools you need to unleash your internal education rock star!

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# BEST PRACTICES: ENGAGING SPEAKERS

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**OVERVIEW:** The most important factor in effective education is the speaker. Attendees will find the event meaningful if material is presented by leaders in their field, great motivators or public figures. A lot of research is required to find and contract the appropriate speaker for an event.

## Selection Criteria

Before you can source a speaker, you need to define your criteria. Your budget, meeting objectives, desired content topics and type of speaker will help you define what you're looking for each program component. Don't forget to also define your content delivery needs.

If you expect a high level of interaction, have virtual attendees, expect speakers to develop marketing materials to help you promote sessions in advance or stay in touch with attendees after and want them to customize their content to fit your audience demographics, those expectations should be mentioned in your call for proposals sent out to solicit speakers or other entertainers. Here are your considerations and the ty



Speaker Type	Useful For	Best Practices
Professional Speakers	Keynotes and general sessions	Brief on event objectives and audience demographics
Moderators & Facilitators	Conversations, discussion and collaborations	Special training may be required if speaker is a chapter leader
Industry Experts	Breakout sessions, demonstrations, labs	Subject-matter expertise is a must, may need speaker training
Academic Speakers	Research and trends breakouts	May require protection for intellectual property
Live Event Host / Emcee	Keeping an event on track, summarizing learning	Need to be focused, articulate and link program elements.
Virtual Hosts	Engaging remote audience members	This is the link between the live and the live-online event
Performers & Entertainers	Entertainment, or linking education with music, dance, art	Brief entertainers on intended audience and expectations

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# BEST PRACTICES: MPI RESOURCES

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**MPI RESOURCES:** You don't have to go it alone! MPI has resources that can help you find the right speakers for your event—both through MPI HQ, the MPI Academy, the MPI Foundation and outside resources such as eSpeakers.

## eSpeakers

The eSpeakers Marketplace takes the risk out of choosing your next speaker. Watch preview videos and read reviews from verified past clients to make sure you're getting the perfect presenter. Use the eSpeakers Marketplace to connect directly with a single speaker, or filter through candidates quickly. Visit <https://www.espeakers.com>.

- Search 11,883 speakers by name, topic, years of experience and CMP Domain
- Watch videos, read customer reviews and see availability dates
- Post event details, RFPs and budgets
- Look for MPI “verified” tag for discounts given to MPI members and chapters

## MPI Webinars

You can use MPI's webinar platform to deliver one hour of specialized content to all of your members, including those who can't join you for your monthly meetings and networking programs. For a \$1,000 fee, MPI will create the event page, schedule a rehearsal with your speaker and facilitate your online experience live. Contact [MPIAcademy@mpiweb.org](mailto:MPIAcademy@mpiweb.org) for more information on this incredible opportunity. Half-day and full-day virtual summit options are also available.

## MPI Certificate Programs

Bring an MPI certificate to your region. MPI has relevant and timely certificate programs that meet the needs of your local community. Topics include safety and risk management, meeting essentials, leadership training and much more. Costs depend on the length of the program--\$2,500 (four hours) or \$3,000 (six hours). Contact [MPIAcademy@mpiweb.org](mailto:MPIAcademy@mpiweb.org) for more information.

## MPI Foundation Grants

The MPI Foundation has grants available to help you with your educational programming. You can apply through a rigorous process for grants up to US\$4,999 for the development of education at the chapter level. Any requests above that amount will need approval from the Global Board of Trustees. Branded chapter grants include bringing MPI's Women in Leadership certificate program to your region—and more opportunities will be added soon. For more information: <https://www.mpiweb.org/foundation/grants>.

# BEST PRACTICES: MPI RESOURCES

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## MPI Academy Speakers

Bring one of MPI's subject matter experts to facilitate engagement at your next chapter education event. From keynotes to breakout sessions, MPI's internal team has the expertise your members crave, and the facilitation skills that will create engaging experiences for you and your guests. From strategic meetings management to experiential design to future trends, trust MPI's speakers and facilitators to bring subject matter expertise to your meetings and events. (And because you are chapters, we'll come for a discounted rate (US\$1,500 + travel and accommodations). Email [mpiacademy@mpiweb.org](mailto:mpiacademy@mpiweb.org) for more information.

## MPI Staff & Board Speaker Program

Through eSpeakers, you can request to have an MPI headquarters executive or board member come to one of your local education events to give MPI updates and discuss recent marketplace trends. There is no speaker fee for these updates, but must travel and accommodation must be included. You can browse available MPI executives and board members here: <https://www.espeakers.com/s/mpib>. For more information or questions, contact [volunteerexperience@mpiweb.org](mailto:volunteerexperience@mpiweb.org).

## Rise Up Program Best Practices

The Rise Up Program highlights multiple ways for chapter leaders to become knowledgeable and access resources. Rise Up Best Practices are featured on the chapter leaders resource page under "Best Practice" headers in each of the different department areas. There, you can select best practices in education and download all documents associated with them.

## Mentor Café and Mentee / Mentor Program

Dallas / Fort Worth Chapter

## Past President's Road Trip

Tennessee Chapter

## Additional Content/Trend Resources

### Meetings Outlook

Meetings Outlook is future-focused data that will help you identify new trends and innovations on the horizon, be sure to review this quarterly for new insights on building your chapter content calendar. This is a great resource for members as well so be sure to remind them in various communications. <https://www.mpiweb.org/education/publications>

### MPI Academy Content

The MPI Academy content, education and resources can be shared with your members, providing an additional ROI for members who may not be able to attend chapter educational offerings or have varying needs. Be sure to share these opportunities with your members.

<https://academy.mpiweb.org>



# BEST PRACTICES: SPEAKER CHECKLIST

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**SPEAKER CHECKLIST:** Here is a quick checklist of items you should review when finding, contracting and managing speakers at your meetings and events.

## Sources of Speakers

- Colleagues
- Industry experts
- Call for abstracts/papers
- Staff/management
- Periodicals/trade publications
- Professional speakers bureaus
- Local personalities
- Organizational membership
- Universities and colleges

## Screening Potential Speakers

- Obtain references
- View recordings of previous speeches
- Attend actual presentation
- Use the scorecard to review candidates

## Provide to the Speaker

- Presentation time
- Date
- Location (city and facility)
- Meeting title and brief description
- Meeting objectives
- Host organization
- Local maps
- Facility floor plan
- Presentation room layout
- Audio visual equipment available
- Session description
- Specific points/topics to be addressed
- Audience demographics and interests
- Speaker requirement and release form

## Obtain from Speaker

- Audiovisual requirements
- Handout material
- Number of pages
- Duplication yes / no
- Distribution yes / no
- Deadline date
- Special needs
- Travel and accommodation
- Photograph
- Biography

## Speaker Arrangements

- Rehearsal
- Presentation introduction
- Assigned escort
- Badges
- Function tickets
- Guest programs
- Expense submission deadlines
- Payment of fees

## Amenities

- Ready room
- Light refreshment
- Audiovisual equipment
- Communication systems

## Post-Presentation

- Recognition
- Gift/plaque/certificate
- Honorarium
- Press coverage
- Thank you letter
- Speaker evaluation

Herein, find additional tools and resources to help you as you work through these steps.

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# BEST PRACTICES: EDUCATION PLANNING ASSESSMENT

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**DEVELOPING PRE-ASSESSMENTS:** Before planning out your chapter's annual education, it is important to think about what will best serve your members. The easiest and surest way to achieve this is by creating and implementing an annual assessment tool that gauges members needs and interests as it relates to personal or professional development. This will give you a gauge on what your focus should be when developing educational programs.

## General Guidelines

**Stay Focused** - Pick a reasonable sized topic to pre-assess. If you are wanting to determine what educational topics would be most engaging for your chapter, only ask questions related to that topic.

**Make it Quick** - By keeping your pre-assessment focused, you can make the testing procedure nice and quick. Pre-assessments are ideally no more than 5 total questions of which only one is open ended. The easier it is for a respondent to fill out, the more likely you are to have a larger data pool.

**Be Comprehensive** – At the same time, make sure that your quick assessment adequately covers all aspects of your topic. Each question should focus on a different aspect of your assessment.

## Innovative Ways to Assess Learner Needs

**Ranking** – Invite participants to review and rank concepts or ideas related to that year's educational theme (detailed on the next page). Participants can rank topics from 1-5 in terms of most to least engaging.

**Likert Scale** – Apply a number to a descriptor and use a 4 point Likert scale to gauge participant needs or interest. For example: "How confident do you feel about your ability to authentically engage with other professionals?" (1) Not Confident (2) Somewhat Confident (3) Confident (4) Very Confident. Your weighted averages will provide numerical data to help you determine your educational priorities.

**Open Ended Prompts** – Instead of a traditional open ended question ask your participants to reply to an engaging prompt. For example: "What education would you need to reach your professional goals a year from now?" or "What types of learning experiences inspire you to do something different after?"

**True | False Questions** – While true/false questions are often used to test knowledge, they can also be a good way to quickly assess learner perceptions. For example: True or False – Authenticity is a topic you find engaging.

# BEST PRACTICES: EDUCATION PLANNING OUTLINE

**DEVELOPING AN EDUCATION OUTLINE:** Before working through each item needed to successfully execute an educational event, it is important to think about your long term educational goals for the year. By developing this outline, you can better inform your assessment and have a clearer picture of the type of education that will be most impactful for your chapter members.

Each year, MPI designs a theme for the World Education Congress (WEC). Below is an example outline that provides the overall theme and individual learning journeys that you can also apply to your education for the year.

**2021 Education Planning Worksheet**

Theme	Learning Journeys
Make Your Future	Innovation
	Leadership
	Connections
	Experiences

### Quarter 1: January-March Experiences

- Local Venue Experiential Event
- Keynote Speaker – Small Businesses

### Quarter 2: April-June Leadership

- Spring Leadership Summit
- Keynote Speaker – Managing Large Events

### Quarter 3: July-September Connections

- Networking Event/Activity
- LinkedIn Workshop
- Guest Speaker

### Quarter 4: October-December Innovation

- Keynote Speaker – Innovative Event Venues
- Innovator's Panel Event

# BEST PRACTICES: CALL FOR PRESENTATIONS

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**CALL FOR PRESENTATIONS:** Your call for presentations may address topics relevant to potential attendees including but not limited to (provide suggestions or example) the following.

- Strategic Management
- Safety and Risk
- Negotiations
- Meeting Design
- Food & Beverage Trends
- Marketing & Social Media

## Developing Your Presentation

Presenters are expected to share information and experience but may not use the conference as a platform for commercial sales. (Conference format needs to be identified prior to the call for presentations.) Presenters of successful submissions should be required to confirm their participation soon after being notified and must adhere to conference regulations.

## Submission Criteria

- Submission deadline (choose deadline based on the critical path)
- Each session proposal must
  - Be submitted separately and include a written abstract that describes the presentation in 100 words or less.
  - Include three expected learning outcomes.
  - Indicate whether it would be suitable for a "basic," "intermediate" or "advanced" audience or some combination thereof.
- A biography of the presenter(s)
- The names and contact information of two people who can discuss the presenter's ability to speak on the proposed topic
- Which topic area the submission addresses
- A description of how the speaker plans to involve participants in their session

## Submission Information

Send your abstract to the following by [date]:  
Conference Planner  
Full Mail Address  
Email Address

## Notification of Acceptance

This date should be approximately one month after the submission deadline. It should include the following information.

- Notification of presentation date and time
- Date for the submission of final presentation materials
- Benefits as a presenter (examples follow)
  - Complimentary access to other education sessions or conference activities Significant discount on full conference registration
  - Enhanced reputation as a knowledgeable industry resource
  - Improved profile for your organization
  - Reimbursements / per diems / speaker honorarium

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## BEST PRACTICES: CHOOSING THE RIGHT SPEAKERS

**SPEAKER SCORECARD:** The most important factor in effective education is the speaker. Attendees will find the event meaningful if material is presented by leaders in their field, great motivators or public figures. A lot of research is required to find and contract the appropriate speaker for an event.

S = Speaker    Rate = Weight of the criteria    Score = X / 5

CRITERIA	RATE	SCORE			WEIGHTED		
		S1	S2	S3	S1	S2	S3
Relevant topic	5	4	5	5	20	25	25
Willing to adapt topic to audience	4	2	5	3	8	20	12
References	2	4	2	4	8	4	8
Engaging (determined by video)	5	4	4	4	20	20	20
Has industry knowledge	4	4	5	5	16	20	20

REQUIRED CRITERIA							
Available on event date		√	√	√	√	√	√
Has not spoken here in last two years		√	√	√	√	√	√
Fits within the budget		√	√	√	√	√	√

<b>WEIGHTED SCORE</b>					72	89	85
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# BEST PRACTICES: SAMPLE SPEAKER WORKSHEET

*\* This is not a contract, nor should it replace your speaker contract. It is a memorandum of understanding that includes all the items necessary for the creation of contracts with speakers.*

## Section 1: General Information

Please return by [date/year]

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

Title: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ Province/State: \_\_\_\_\_ Postal: \_\_\_\_\_

Business Phone: \_\_\_\_\_ Mobile Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Emergency Name: \_\_\_\_\_ Contact Phone: \_\_\_\_\_

Special Needs (please indicate anything we should know: \_\_\_\_\_

For our planning purposes, please select any food and beverage events you will be attending.

Thursday Reception  
 Friday Lunch

Thursday Dinner  
 Friday Dinner

Friday Breakfast  
 Saturday Breakfast

Do you want your business address and phone number listed in the program?  Yes  No

## Section 2: Biographical Information

In an effort to have consistency in the biographical information, we ask that you use the following format. Your listing may be limited to 50 words.

Name (as it will appear in the program): \_\_\_\_\_

Title: \_\_\_\_\_

Special awards/recognition: \_\_\_\_\_

Field of specialization (include years of experience): \_\_\_\_\_

# BEST PRACTICES: SAMPLE SPEAKER WORKSHEET

Key qualifications that will interest attendees: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Please enclose a high-resolution photo (300 dpi .jpg, .tif or .eps file)

## Section 3: Session Description

Title: \_\_\_\_\_

Description (limited to 100 words): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Three learner outcomes: What will participants discover in this session/workshop? Focus on learning rather than teaching. Include a verb phrase and an impact ("in order to") phrase—what will participants be able to do and how will they apply it? Use Bloom's taxonomy to identify verbs you can use to describe student learning.

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

Skill Level:

- 1. Coordinator
- 2. Manager
- 3. Director
- 4. All of the above

Format:

- 1. Single Interactive Lecture
- 2. Workshop
- 3. Keynote
- 4. Panel
- 5. Co-Presenter

Learning Style:

- 1. Lecture (listen and learn)
- 2. Interactive (learn, practice)
- 3. Peer-to-Peer (discussion)

Topic:

- 1. Inside Industry (specific to the meeting industry/delivered by industry expert)
- 2. Outside Industry (general business topics/delivered by outside experts)

\_\_\_\_\_

# BEST PRACTICES: SAMPLE SPEAKER WORKSHEET

## Agreements and Releases

I agree to limit my presentation information and materials to those directly relevant to the session topics, and will not promote in a commercial way my products and services or the products and services of any organization. I agree to have my presentation electronically recorded and available for sale during and after the event.

## Section 4: Audiovisual and Other Requirements

Please let us know your requests for audiovisual equipment and needs at our event.

- |                                               |                                   |                                                  |
|-----------------------------------------------|-----------------------------------|--------------------------------------------------|
| <input type="checkbox"/> Overhead projector   | <input type="checkbox"/> Screen   | <input type="checkbox"/> LCD monitor             |
| <input type="checkbox"/> Hand-held microphone | <input type="checkbox"/> Lavalier | <input type="checkbox"/> Lectern                 |
| <input type="checkbox"/> Dais                 | <input type="checkbox"/> Table    | <input type="checkbox"/> Chalkboard / whiteboard |
| <input type="checkbox"/> Flipchart            | <input type="checkbox"/> Markers  | <input type="checkbox"/> Slide advancer          |

Other \_\_\_\_\_

### Handout Material

- Distribute prior to event
- Distribute following presentation
- No materials will be provided

### Material Information

- All materials are included and may be distributed to press and registration
- All materials will be submitted by \_\_\_\_\_
- A copy of the presentation will be available for duplication and distribution

## Section 5: Financial Arrangement

Terms of agreement should be completed by the meeting professional prior to the meeting.

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

Session Title: \_\_\_\_\_

Session Time / Date: \_\_\_\_\_ Room No.: \_\_\_\_\_

It is understood that the honorarium paid for the above presentation will be \$ \_\_\_\_\_.

Reimbursable items include: \_\_\_\_\_

Expenses paid for include: \_\_\_\_\_

All other provisions are the responsibility of the speaker.

# BEST PRACTICES: SAMPLE SPEAKER WORKSHEET

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The terms detailed herein are acceptable to me.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Return To:**

[First Name Last Name]

[Street Address]

[City, Province, State]

[Country, Postal Code]

[Telephone]

[Email]

*\* This is not a contract, nor should it replace your speaker contract. It is a memorandum of understanding that includes all the items necessary for the creation of contracts with speakers.*

# BEST PRACTICES: SPEAKER CONTRACT

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## [CHAPTER NAME] Speaker Contract

This AGREEMENT is made between [Chapter Name] [Chapter Address] and [Speaker Name] ("Speaker"). It is effective today, [Date].

### I. ENGAGEMENT

The speaker, to the best of their ability, shall present the following session(s) at [Event] at [Location] in [City, State/Province, Country].

Session #1

Title:

Date & Time:

Session #2

Title:

Date & Time:

### II. COMPENSATION

As consideration for services to be rendered by Speaker under this Agreement, MPI shall provide the Speaker:

MPI agrees to pay/reimburse the following:

- Travel reimbursement: [Description]
- Hotel: [Description]
- Meals Cover: [Description]
- Airfare: [Description]
- Transportation: [Description]
- Speaker fee: [Description]

### III. PERFORMANCE

Speaker shall abide by the [Chapter Name] Standards of Professionalism (not defame, slander or libel any person, firm or corporation. Present sessions according to MPI Standards of Professionalism and not denigrate MPI, its programs or representatives in any manner. State that all materials and content presented by Speaker do not infringe or violate any copyright, trademark, patent or intellectual property rights of any person or entity, nor do these materials and content promote or endorse any product, service, or device which may or is at the time of the program not approved by any governing agency. Not sell or promote any particular product or service at any time during the session presentation(s). Speaker must disclose all events where contracted presentation or research has been or will be presented prior to the engagement listed above. Speaker must also agree to forgo presenting the aforementioned content at any other industry meeting or event (including MPI chapter events) prior to the contracted engagement with MPI without the expressed written consent from MPI.

# BEST PRACTICES: SPEAKER CONTRACT

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## IV. CANCELLATION

MPI reserves the right to cancel this Agreement and replace Speaker if the specified due dates for deliverables are missed. MPI reserves the right to cancel any session, change the length or size of any session, or change the place of any session at its discretion at any time. In the event of cancellation, MPI shall not be liable for any expenses, costs or damages incurred by Speaker except for any expenses incurred and not recoverable. If Speaker desires to cancel, Speaker agrees to provide 30 days' written notice to MPI's Professional Development Department of cancellation prior to her/his first scheduled session.

## V. FAILURE TO PERFORM

In the event of failure or refusal of Speaker to perform her/his obligations under this Agreement (other than failure to perform for reasons beyond Speaker's control per Section 6 Force Majeure/Excuse of Performance), all costs, charges and expenses MPI incurs shall be part of the damages to be paid by Speaker to MPI as a result of such failure or refusal to perform, including but not limited to attorneys' fees and expenses.

## VI. FORCE MAJEURE/EXCUSE OF PERFORMANCE

- This agreement will be binding on both Speaker and MPI, and there shall be no right of termination without liability on the part of the Speaker for the purpose of accepting a different engagement on the same date or on the part of MPI for booking a different Speaker for the same engagement, except as specified in this Agreement.
- The performance of this agreement by either party is subject to acts of God, war, government regulation, disaster, fire, terrorism, strikes, civil disorder, or curtailment of transportation facilities unreasonably delaying or preventing at least 40 percent of anticipated attendees from attending, Speaker's illness or injury, or similar cause beyond the control of the Parties making it illegal, impossible or commercially impracticable to hold the MPI event or to make the presentation. This agreement may be terminated upon the breach of any material term of this Agreement and failure to cure within a commercially reasonable time, provided written notice of such termination is given. Upon termination, all consideration due to Speaker shall cease as of the termination date.

## VII. LICENSE FOR CONTENT ARCHIVING/CAPTURE

Speaker grants to MPI a non-exclusive license to audio and/or video record presentation.

Yes, I agree with the non-exclusive license to audio and/or video record my presentation(s)

No, I do not agree with the non-exclusive license to audio and/or video record my presentation(s)

Please sign and date below. Please return this agreement within a week of receiving it to [Name] via email at [Email]. Retain a copy for your files.

---

[SPEAKER NAME]

[Date]

[VP EDUCATION]

[Date]

# BEST PRACTICES: SPEAKER COACHING CALL

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**SPEAKER COACHING CALL:** Before your event, you will want to have a 1:1 call with each of your speakers. Herein find the details you will need to go over with your speakers.

## MPI and Event Background

Share information with your speaker about what MPI is, the history of your chapter and the direction you are going. Discuss the meeting, why it is happening, and what your objectives are. Share what success will look like, and how the speaker can fit into that success story.

## Event Theme and Design

Share the theme for the event, what messages you are pushing and ask how the speaker can incorporate that theme into the presentation. Discuss the design of the event, and why you have made some of the choices you made in that design.

## Attendee Demographics

Share who your attendees will be (corporate planners, meeting management professionals, third-party planners, entrepreneurs, audiovisual and hotel partners, DMOs, faculty / students). Describe some of the pain points for these groups, and ask the speaker if they can address those during the session.

## Speaker Expectations & Best Practices

MPI events aren't typical conferences. The audience has very high expectations of the speakers and their presentation styles. With neuroscience in mind, ask your speaker to organize a presentation in 10-minute sections called "chunks" and connect the segments using stories, called "hooks" to set context for what they are about to share. Ask them to use no more than "tweets" worth of verbiage on slides, which equates to just a few words supported by a relevant graphic. Share any apps or technologies you are offering that can help the speaker engage with the audience, including any polling tech you have partnered with.

For no reason can they use this session as an advertisement for their services or company.

## Session Details

Go over the session details, including title, time and description. Share the location of the event and the room number of the sessions. If there are additional presenters, ask if they need a panel set and additional microphones. Ask that the speaker arrive 30 minutes before their session is scheduled to start. Tell the speaker the deadline for submitting their presentation in advance.

\*\* Show diagram of the room. \*\*

Tell your speaker about the aspect ratio for presentations, and if there is an event template, be sure to share that with them. Ask if there is sound or video and if they will need their Internet browser during the presentation. Tell them to ask attendees to rate the session at the end of their presentation, and how the attendees will be answering the survey.

# BEST PRACTICES: SPEAKER COACHING CALL

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## Speaker Prep

- Ask about missing headshots or bios.
- Have they signed their agreement?
- Have they registered for the conference?
- Have they received the hotel link? When is the housing deadline?
- Have they booked their travel?

## Sponsorship

\*\* Let the speaker know if their presentation has been sponsored. \*\*

If so, tell them what the benefits of the sponsorship are, and whether the sponsor will be given stage time, and when that will occur.

## Social Media

Ask the speaker to follow the conference hashtag and use it when they tweet, post or share pictures is the fastest way to connect with other participants before, during and after the conference. Wherever the speaker is active, ask if it would be possible to hear from them and see how they're enjoying the event experience, so don't hesitate to follow and tag us. Here's the important stuff.

- Conference hashtag:
- MPI on Facebook:
- MPI on Twitter:
- MPI on Instagram:
- MPI on Snapchat:
- MPI on Periscope:
- MPI on YouTube:

## Onsite Contact Information

Make sure that you have the speaker's mobile number, and that they have a number to reach you or their best contact while they are onsite.

## Next Steps

Let your speaker know when they can expect their speaker "Know Before You Go" document. Quickly review the items that you still need from them (if any).

## BONUS!

Curious about how to create more brain-friendly presentations, and how your speakers and facilitators can do the same? Check out this video from MPI Academy Director Melissa Majors—and share it with your friends: <https://vimeo.com/274565545>.



# BEST PRACTICES: GREAT LEARNER OUTCOMES

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## Tips for Writing Great Learner Outcomes

### A.S.K. & A.B.C.D. Models

When writing a learning objective, determine what type of change you are trying to make using the A.S.K. model:

**Attitude** — Changes how a learner chooses to act. Compliance training is a good example of when you will have to teach to this domain. It's usually the hardest to craft objectives for this, since it's dealing with feelings, emotions, and attitudes.

**Skills** — This domain focuses on changing or improving the tasks a learner can perform.

**Knowledge** — This domain focuses on increasing what participants know. Learning safety rules, troubleshooting, and quoting prices from memory are all examples of this level of learning.

Then move to the A, B, C, D's of writing an objective:

**Audience:** It's important that your objective identifies the people that will be doing the learning. Typically, this will involve the word, "learner" or "participant."

**Behavior:** You'll need to identify what the participants are going to do differently. This component will contain your action verb (verb examples below)

**Condition:** This part of the objective will describe the situation of the participants.

**Degree of Mastery:** This part of the objective is closely tied to the change in behavior, as it stipulates the degree of the change.

*Note: If an objective contains a compound such as "and" it should be broken into its own learning objective in order to better assess each metric.*

## Learner Outcome Example

### Diagram Your Outcomes

Audience	Behavior	Condition	Degree
Participants	Construct	Contracts	Without Errors

"After this course, participants will be able to construct contracts without errors."

*Note: On the following page is a detailed list of action verbs to use when writing learner outcomes.*

# BEST PRACTICES: GREAT LEARNER OUTCOMES

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## Action Verbs for Writing Learner Objectives

Cognitive Domain\*

Knowledge	Understanding	Application	Analysis	Synthesis	Evaluation
Acquire	Associate	Apply	Analyze	Arrange	Appraise
Define	Clarify	Assemble	Compare	Categorize	Approve
Identify	Contrast	Calculate	Contrast	Combine	Assess
Indicate	Describe	Change	Diagram	Compose	Choose
Label	Discuss	Classify	Differentiate	Create	Criticize
Match	Estimate	Complete	Discriminate	Design	Critique
Name	Explain	Coordinate	Dismantle	Develop	Determine
Note	Extrapolate	Compute	Dissect	Explain	Evaluate
Outline	Generalize	Construct	Distinguish	Formulate	Grade
Quote	Interpolate	Convert	Separate	Generalize	Judge
Recall	Interpret	Correct		Integrate	Measure
Recite	Summarize	Demonstrate		Invent	Rank
Recognize		Discover		Organize	Rate
Record		Draw		Plan	Recommend
Review		Examine		Prepare	Select
Select		Find		Reconstruct	Support
State		Illustrate		Revise	Test
Tabulate		Locate		Specify	Value
Write		Operate		Summarize	
		Perform		Synthesize	
		Practice			
		Predict			
		Prepare			
		Produce			
		Relate			
		Stimulate			
		Solve			
		Trace			
		Use			
		Utilize			
		Write			
		Visualize			

\* Approximately 80% of learning objectives fall into this domain. For verbs associated with the affective and psychomotor domains, visit <https://bit.ly/2HNrVO2>.

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# BEST PRACTICES: SPEAKER MANUAL

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**SPEAKER MANUAL:** Your speaker manual is your speaker's Know Before You Go document and should include all the information your speaker needs to feel comfortable preparing for, arriving, staying, presenting and leaving from your event. Here is a list of items that should be included in your speaker manual.

## Session Information

### Developing Your Session

The meeting professional [Name, Contact, Mobile Number] is available to answer any questions and/or provide assistance with developing your session outline and will work closely with you to provide an understanding of the audience and to ensure a high-quality session.

### Non-commercial Nature of Sessions

Speakers and facilitators must refrain from the use of brand names or specific product endorsements in their presentation. Under no circumstances is this platform to be used as a place for direct promotion of a speaker's product, service or monetary self-interest.

### Handout Material

Handouts are a vital component to the learning experience. They provide a "touchstone" to help solidify and recall the content and experience. All speakers are required to provide handouts and all handout materials must be approved by the organization.

Handouts must be in Microsoft Word or PowerPoint. Handouts will not be accepted on company letterhead. It is very helpful to use your presentation as a handout – with room for note taking. The final version should look professional and include bullet point outlines, checklists, forms, case studies, reprints, resource bibliographies, etc. as appropriate.

A draft copy of the speaker presentation is due on [date]. Final presentations/handouts by email are due no later than [date]. NO handouts will be copied onsite. Only handouts received by the deadline will be duplicated. Handouts not available by the deadline must be copied and shipped at the speaker's own expense – after first being approved.

### Room Set-up

You must complete and return the Audiovisual / Room Set-Up Requirements form included in this manual by [date]. Please note that the room set-up will ultimately be at the organization's discretion. We will strive to meet your needs but may need to alter your requested set-up to accommodate everyone using the room that day, including our attendees.

### Session Attendance

It is estimated that there will be [number] participants in your session.

# BEST PRACTICES: SPEAKER MANUAL

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## Participating in a Conference Call

In an effort to better assist speakers and to strengthen sessions, all presenters will meet by conference call with the meeting professional and program committee chair, if applicable. During the conference call, please be prepared to discuss your outline, handouts, the session's interactive elements, the primary subject matter of your session and your presentation style. We can also provide further audience information and answer any questions you may have.

## Speaker Ready Room/Session Rehearsal

There will be no scheduled rehearsal time for your event. We will provide a "speaker ready room" onsite for your use. We recommend that you arrive at your session room 30 minutes prior to the start of your session.

## Session Introductions

You will be introduced at the beginning of your session. Please provide brief biographical information for use in your introduction and in promotional material.

## Help During Your Session

Onsite staff will help distribute handouts, distribute and collect evaluations and assist you.

## Evaluations

Attendees will be asked to evaluate each session. Evaluation forms will be available at the beginning of each session. Please remind attendees to complete the evaluations at the end of your session. You will receive the results of your evaluations approximately one month following the conference.

## In Case of Emergency – Prior to Event

If you are unable to present as the result of a last-minute emergency, please call the meeting professional. We will provide you with the onsite office telephone number closer to the conference date.

## Expense Reports

Your expenses must be recorded and submitted no later than 30 days after the conference. Please complete and return the form on Page [number]. Original receipts must be attached. The following expenses are eligible to be covered:

- Transportation from your home to the airport and back (either mileage or fare) up to [cost].
- Transportation from the airport to the hotel and back up to [cost].

The following items will not be covered:

- Parking at your home airport
- Incidentals in the hotel (e.g. movies, room service, mini bar)
- Food and beverage outside of conference functions

# BEST PRACTICES: SPEAKER MANUAL

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## Developing Your Session

### Active Involvement

A simple question/answer format is not sufficient. Neither are traditional methods such as pop quizzes. Highly interactive methods encourage learning, build learners' confidence and enhance the transfer of learning to the workplace. The success of your session will depend on the degree of involvement of your learners, as well as the content you provide.

Involving your attendees can be done with activities such as peer discussion, small group activities, case studies, role-play, games or other engaging techniques. A question and answer opportunity is vital, and so is vibrant discussion and debate throughout the entire session.

### Developing Your Session Outline

1. Analyze Your Learner
  - Who are they?
  - What do they want from you? (Skills? Content?)
  - What do they need? (Confidence? Feedback? A paradigm shift?)
  - Why would they come to your session to get it?
2. Determine What to Deliver
  - Once you have analyzed your audience, you are ready to develop the critical subject matter and issues within your session; describe appropriate sub-topics and subjects; and organize it all in an outline.
  - All topics and subjects you select should be appropriate to one or more of your learning outcomes. This process helps you to focus on your learners' needs. This might not necessarily be what you think they would like to hear or see.
3. Determine Your Instructional Methods
  - Include how you intend to deliver your information and how you intend to actively involve your attendees. These methods depend on your learning outcomes. For example, if a case study is to be used, it is written as a narrative by the presenter or by one or more of the session participants in advance. It typically describes a real situation that is complex or ambiguous and that requires analysis and decision. As your session will be 90 minutes long, any case study you use should be shorter than two typed pages. The case study method encourages attendees to learn from each other as well as from you and the handout material.
  - If simulations and role-plays are used, these should be done as group-based activities designed to mirror the organizational dynamics and decision-making realities of real life situations. Teams of participants practice the design, implementation and control of strategies relevant to association executives. Emphasis is placed on the application, rather than the definition, of concepts, principles and methods relevant within the environment.

# BEST PRACTICES: SPEAKER MANUAL

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## Methods to Increase Learning and Enjoyment of Your Session

- At the beginning of your session, clarify the participants' expectations and needs from the program by asking for feedback. For example, ask "What are you expecting to get out of this session?"
- Identify how the presented information will benefit the participants. Participants need to understand the value of the session.
- Throughout the program, allow time for participants to relate the material and information back to their current work situations and lives.
- Encourage participants to share "war stories" and successes.
- Check for understanding throughout the session.
- Actively involve participants in any way you can.

## Developing Your Visuals

**Why Use Visuals?** The entire concept of a successful presentation is based on using the visual medium to reinforce, underscore and support your presentation. Since this event is a learning experience, we encourage you to use a visual medium in your presentations.

- **Plan Content** - Your visual presentation should meaningfully support your statements rather than repeat them. Reinforce every major point in your presentation with a title or graphic visual. Dramatize the major conclusions in your presentation with a special effect. Emphasize, support or reinforce points in your presentation with copy, photographs or charts.
- **Be Consistent** - Focus your presentation using a couple of complimentary colors and one graphic and writing style. This will allow your visuals to build on one another and reinforce your verbal presentation. Change colors or combinations only with a purpose to differentiate sections within the presentation, for a multi-speaker presentation, etc.
- **Use Charts and Graphs Effectively** - Use the correct type of chart for your purpose. Be sure that the relationship you are portraying is obvious. Keep charts and graphs simple.
- **Keep Moving** - A well-paced presentation should have a visual change at least once every two minutes. Longer intervals may lead to a disinterested audience. Therefore, be sure and read through your outline and script to determine the necessary intervals. Add or subtract materials, charts and/or graphs until your timing is right.
- **Simplify Visuals** - Edit the copy on your visual to a minimum so that you don't reveal more information than needed. You don't want your attendees to read ahead and not hear what you are saying.

## Presentation Tips and Cautions

- **Begin with objectives** - Invite everyone to focus.
- **Be Familiar with the Material** - Talk it - don't read it or recite memorized material.
- **Use Specific Ways to Engage Attendees** - Be specific and concrete. Accompany your key points with analogies or real-life examples to get your attendees involved.
- **Make Sure Your Presentation Relates to Your Handouts** - Include the most important points you want your attendees to remember in both your presentation and handouts. Audiences often react negatively if the handouts do not reflect the presentation and overheads.

# BEST PRACTICES: SPEAKER MANUAL

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## Presentation Tips and Cautions (continued)

- Refrain from Selling - Sessions must not be utilized as a vehicle for advertising - this results in negative feedback. (Even speakers who simply overemphasize the positive characteristics of their company/product or abilities without overtly selling receive poor evaluations.) This includes the selling of books, tapes, or other products.
- Be Comfortable and Down-to-Earth - Use humor if it adds to the program. Remember that there is a broad mix of people in your session, therefore profanity or off-color humor is prohibited.
- Speak to Your Audience - If you want to draw the attendees' attention to the screen, stop speaking, point to the item, then return your eyes to the audience and resume speaking.
- Know the Order of Your Visuals - Avoid looking at the screen to determine which one is portrayed. If you need to refer to a previous visual, have an extra copy made and position it where needed.
- Be Animated - Avoid standing firmly in one place (e.g. behind a podium). Move your hands, head and arms. Use facial expressions to emphasize the most important points of your presentation. Effective eye contact will enhance comfort, contact and rapport with the attendees.
- Seek Feedback - Read nonverbal signals as well as comments.
- Avoid Overload - Keep things simple.
- Use the Audience as a Resource - Ask questions of attendees to solicit data and problems. List answers on an overhead or flipchart. (Make sure that it can be seen in the back of the room.)
- Allow Flexibility to Provide for Interaction and Surprises
- Watch the Time - Bring a small alarm clock or set your watch alarm or have someone cue you so you stay on schedule.

## Adult Learning Insights

- Motivation to participate is different from one adult learner to another - a complex combination of what the person brings to the experience and what happens
- Adult learning is more than the transfer of knowledge – it is also being encouraged to think critically and participate in the learning
- Adults learn best when their knowledge and experience is acknowledged and utilized
- Adults want to know “what's in it for me?” – both content and application
- Adults want to apply the information to real life, present situations
- Adults know if a speaker understands their needs and their situations

## Retention of Information Requirements

- An adult learning environment – with consideration for their physical needs
- Active involvement
- Relevant examples and practice of skills
- A feeling of support, understanding
- Acknowledgment and use of their backgrounds and experience



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# BEST PRACTICES: EIC PREFERRED PROVIDER

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## Events Industry Council Preferred Provider Program

You will be able to attract more attendees and provide more benefits to your members if you register your program and apply for hours as part of the Events Industry Council's Preferred Provider program.

The EIC administers the Certified Meeting Professional (CMP) test that is the primary designation indicating meeting planning competency in the event industry. In order to qualify to take the CMP test, or to re-certify competency, meeting professionals must amass 25 "clock hours" of industry-specific education.

To accomplish this most efficiently, your chapter should become an Events Industry Council Preferred Provider. This will allow you to pre-register your programs, certify that they are clock hour eligible and you will be able to upload attendee rosters after your education sessions so that attendees who have EIC accounts can have their transcripts updated (semi) automatically.

As a CMP Preferred Provider you receive the following benefits.

- Approved education events will be listed on the exclusive directory of CMP Preferred Providers on the Events Industry Council website with a direct link to register.
- Marketing copy and program logos that can be used on marketing materials.
- Promotion by Events Industry Council of CMP Preferred Providers continuing education opportunities as the Events Industry Council's recommended method for CMP and CMP-HC professionals to gain their CE credits.
- Ability to load your attendance lists directly into attendee CMP online profiles.

Preferred Provider status is per calendar year (January through December). You will need to apply each year to maintain your Preferred Provider status. When applying, consider how many sessions you will be throughout the year, since pricing is based on the total number of sessions you submit throughout the year.

To become a CMP Preferred Provider, you must submit an application and a session review form for each event. Local chapters of Events Industry Council members do receive the member rates. Choose which tier of service best fits your chapter based on the number of sessions you offer during the year. A late fee is charged for sessions submitted retroactively for review.

Preferred Providers receives the results of their program review 2-4 weeks after submission. Events Industry Council, in its sole judgment, has the authority to deny any session(s) if the Preferred Provider violates any policy or procedure, or if any session does not align with the CMP International Standards.

You will need to re-submit all sessions each year even if the session content stays the same. Session approvals are valid through December 31 of the same year as the start date of the session. Course materials must be retained and made available to the Event Industry Council upon request for a period of five years following the most recent program completion.

## BEST PRACTICES: EIC PREFERRED PROVIDER

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	2021 Nonprofit Rate*	2021 For Profit Rate
Single Session (1 Event )	\$250 USD	\$300 USD
Level 1 (2-15 Events)	\$440 USD	\$525 USD
Level 2 (16-50 Events)	\$625 USD	\$750 USD
Level 3 (51-100 Events)	\$940 USD	\$1125 USD
Level 4 (101-250 Events)	\$1250 USD	\$1500 USD
Level 5 (250+ Events)	\$1875 USD	\$2250 USD

\* MPI Chapters qualify for the non-profit rate.

As the goal of continuing education to maintain and enhance the professional competency of CMP professionals, all CE programs must address one or more topics listed in the Events Industry Council's CMP International Standards.

Program content must be current, correct, and presented in an appropriate format and design. A subject matter expert must be involved in the authorship and review of a program. The SME must demonstrate significant practical experience, such as CMP certification, an academic degree, other credential or more than 5 years of relevant experience.

Programs must be presented in an initial unit of at least 0.50 hours (60 minutes equals one class hour) with quarter hour increments accepted after the initial 0.50 hour has been satisfied. Total hour will be rounded down to the last full quarter hour. Breaks, meals, independent study time, and exam administration time are not included in the hours calculation.

### Excluded topics

The Events Industry Council will not approve sessions for general personal development, such as sessions on stress management, time management, etc. In addition, CMP credit is also not permitted for non-educational activities such as networking functions or exhibit hall hours. Approval will not be given for software demonstrations pertaining to the management of meetings or for internal company training for internal products. Sessions which could generally be categorized as a sales pitch are not eligible.

### Additional Information and Application

For more information about the EIC Preferred Provider program, visit <https://www.eventscouncil.org/CMP/Preferred-Providers/Terms-and-Conditions-of-EIC-Preferred-Provider-Programme>. To apply for the program and get started, visit <https://www.eventscouncil.org/CMP/Preferred-Providers/Become-a-Preferred-Provider>. If you have additional questions email [continuinged@eventscouncil.org](mailto:continuinged@eventscouncil.org) or call (202) 367-1190 for assistance.

# BEST PRACTICES: UNIQUE FORMATS

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**UNIQUE LEARNING FORMATS:** Encourage your speakers to utilize unique formats to help learners engage with them and with one another. These can be stand-alone session formats or can be incorporated into existing sessions as activities or ways to promote engagement. This is just a short list of the thousands of engagement opportunities available to speakers, facilitators and moderators.

## Open Space Technology

Open Space Technology (OST) is a design approach with no formal agenda beyond overall purpose or theme. Participants create their agendas—for anything from a simple session to a complete multi-track conference—in a relatively short time using simple guidelines. After the meeting or event, participants debrief. A few basic elements characterize open space meetings.

- An invitation that explains the purpose of the meeting
  - Participant chairs arranged in a circle
  - A “bulletin board” of challenges or opportunities posted by participants
  - A “marketplace” of breakout spaces where participants “shop” for information or ideas
- Typically, an open space meeting begins with short introductions by both the sponsor and the facilitator. The sponsor introduces the purpose and the facilitator explains the open space process. Then, the group creates a working agenda on the bulletin board (or other large surface). Each breakout session “convener” takes responsibility for posting an issue, assigning it a space and time and, later, kicking off the conversation, taking notes and sharing them with all involved.

SOURCES: Wikipedia.com, Openspaceworld.com

## Unpanel/Fishbowl

A panel is useful for interactive discussions among many people. Four to five speakers converse at any given time (in the fishbowl) and are surrounded by a much larger group of people. Anyone can join the inner circle when a seat becomes available. In an open fishbowl, one chair is left empty and any member of the audience can join. When this happens, an existing member of the fishbowl must voluntarily leave and free a chair. In a closed fishbowl, all chairs are and remain filled. To start the fishbowl, a moderator introduces a topic and participants start the discussion. When time runs out, the moderator closes the fishbowl and summarizes the discussion.

SOURCE: Wikipedia.com

## Spectrogram

A spectrogram highlights the range of perspectives in a group. A facilitator asks a question of interest and directs participants to take a stand along an agree-disagree spectrum, which can be imaginary or a strip of tape along the floor. The facilitator then interviews people at different points on the spectrum about the opinions they hold. This process creates a shared experience while demonstrating the range of opinions in a community. It can serve as an anchor for additional conversations.

SOURCE: Conferencethatwork.com

# BEST PRACTICES: UNIQUE FORMATS

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## Speed Geeking / Rapid Demos

Speed geeking allows participants to quickly view several presentations within a fixed period of time. Speakers present a five-minute demonstration for a small audience. After five minutes, the audience moves on to the next demo/presentation area. This format offers advantages for both sides: presenters refine their pitch through repetition and participants move from demo to demo, efficiently using their time while exposing themselves to new concepts. A large room is an ideal venue.

SOURCE: Unconference.net

## World / Knowledge Café

A world café is a conversational forum that allows for in-depth exploration. Tables are set like a small café with approximately four to six seats each. A facilitator puts forth a topic and participants discuss for about 20 minutes. At the end of the allotted time, one participant stays behind and summarizes the conversation to the next group that comes to sit at the table. The other people move on to different tables and another round of conversations commences. At the conclusion of three rounds, the facilitator collects the conversation notes and shared with participants verbally, physically or electronically.

A variation on the world café, a knowledge café begins with participants seated in a circle of chairs (or concentric circles of chairs). A facilitator explains the purpose and then introduces a topic and poses one or two open-ended questions. Participants break into groups to discuss the questions for about 45 minutes. Then, they return to the circle, and the facilitator leads the full group through another 45-minute session during which people reflect on the small group discussions and share thoughts, insights and ideas. A knowledge café is ideal for between 15 and 50 participants. If there are more than 50 participants, it's usually necessary to employ microphones this can inhibit the flow of the conversation.

SOURCE: Wikipedia.com

## Graphic Recording

Graphic recording strategically combines words and images to convey information. Practitioners use large sheets of paper or whiteboards to document dialog and group activities using images, symbols and words. Images often convey information more efficiently and effectively to wider and increasingly diverse audiences. Visual language can be a useful tool in helping people tolerate ambiguity and communicate quickly, often before concepts are ready to be communicated using traditional writing.

SOURCE: Wikipedia.com

## Mini-Lecture

Popularized by the TED Conference, these abbreviated talks focus the messenger and the message. These short presentations are highly scripted, well-rehearsed events supported by compelling PowerPoint slides and orated by professionals. Taking a full-length presentation and reducing it to an effective 15 to 18-minute story requires careful planning and consideration. Some mini-lectures precede brief facilitated discussions, often by the presenter themselves.

SOURCE: Wikipedia.com

## BEST PRACTICES: UNIQUE FORMATS

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### Pecha Kucha / Ignite

Japanese for “chit chat,” this delivery format was developed by a group of designers as a way of sharing their work. During Pecha Kucha presentations, speakers present 20 images/slides for 20 seconds each for a total presentation time of 6 minutes and 40 seconds. Today, there are more than 550 cities around the world that host Pecha Kucha Nights. The format’s popularity lies in its easy accessibility (anyone can do it) and the rapid and often entertaining short-story format. An Ignite session involves 20 images shared for 15 seconds each for a blistering five-minute presentation. As with Pecha Kucha, the challenge is on the presenters to tell a compelling story using the most appropriate images within the time allowed. Make sure to register your Pecha Kucha if you choose to do one formally.

SOURCE: Pecha-kucha.org

### Story Slam

Like a poetry slam, story slam allows participants five minutes to tell a story, usually part of a chosen theme. No notes are allowed, and the stories must be told, not read. This is an ideal vehicle for sharing information, because the stories connect speaker to audience on an emotional level.

SOURCE: Themoth.org

### Buzz Groups

Buzz groups are small units that break off from a larger assembly in order to generate ideas for the larger group to discuss or act upon. The use of buzz groups was first associated with J. D. Phillips and is sometimes known as the Phillips 66 technique. Large groups may be divided into buzz groups after an initial presentation in order to cover different aspects of a topic or maximize participation. Each group appoints a spokesperson to report the results of the discussion later.

SOURCE: Kstoolkit.org

### Mashups

Like their musical roots imply, mashups are a collection of seemingly random groups that gather to share interests and ideas. A mashup can be organized by anyone at a meeting or event and promoted via a variety of channels from word-of-mouth to social media. A Tweetup is essentially a mashup organized via Twitter. Mashups can be planned or spontaneous. They provide participants with a time and place to get their needs addressed, in the case that formal educational programs or networking opportunities are not helpful or convenient.

SOURCE: Theperfectmeeting.com

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# BEST PRACTICES: SESSION EVALUATION

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**INSTRUCTIONS:** Please evaluate this session by answering these questions. The highlighted questions are those that are included in the 2019 Chapter Metric Incentive Program.

- 5 – Completely agree
- 4 – Agree
- 3 – Neutral
- 2 – Disagree
- 1 – Completely disagree

## Presentation

- I am satisfied with the overall content of this program.
- The delivery of the session content was consistent with the session description and stated learning objectives.
- The delivery of the session was well organized.
- The format/design of the session facilitated learning.
- I would recommend this session topic to a colleague.
- There are usable takeaways from this session.

## Presenter

- I am satisfied with the quality of the presenter.
- The presenter used the time allotted for the session effectively (e.g., presentation, discussion and interaction).
- I am satisfied with the communication skills of the presenter.
- The presenter knew the subject matter and provided information that was relevant and beneficial.
- The presenter was responsive in answering audience questions.
- I would recommend this presenter(s) to a colleague.

## Overall

- Overall, I am satisfied with this educational event. (ENTER THIS SCORE IN YOUR DASHBOARD.)

Additional comments (what you liked best about this presentation, how it could have been improved, etc.)

## EDUCATION SATISFACTION INCENTIVE GOAL

**Purpose:** To gain understanding of members overall satisfaction with chapter level educational opportunities and content.

**Goal:** The education incentive goal is based on the survey data provided at the chapter level following each educational offering. Chapters will include the following question in each of their education surveys. Chapters will be measured for the purposes of metrics on the overall program satisfaction.



# BEST PRACTICES: SESSION EVALUATION

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## Dashboard Tracking

To enter your survey scores into the dashboard follow these steps.

Step 1: Enter the total combined score for the “overall program satisfaction” question from each respondent into the dashboard.

Step 2: Enter the total number of respondents in the space provided.

The dashboard will automatically total your average overall program satisfaction for the month for you. The dashboard will also automatically calculate the average satisfaction for the year. Your incentive is based on the yearend average.

If you have multiple education program styles such as monthly educational luncheons designed for larger audiences and coffee talks designed for much smaller segments of membership, you will need to work with your CBM to determine which programs will be tracked for the metric goal and document it in the notes section of your dashboard.

It is recommended that you list additional program scores in the notes section to have for reference and tracking purposes. The same process applies to multiple education programs in the same month. If your multiple monthly programs are similar, you can choose to combine both and track as overall for the month.

You will need to work with your CBM on these variations to ensure tracking is clear.

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