

SECTION 3

RMR SEMINAR GUIDELINES

JOB DESCRIPTIONS

(updated 02/2025)

JOB DESCRIPTIONS

A. Seminar Chair

Qualifications:

The seminar chair shall have prior administrative experience, be capable of dealing with large groups of people, and be able to delegate responsibilities. A delineation of the chair's responsibilities is described below:

Duties:

1. Reports to and directs questions on seminar policy to the assistant region director for interpretation.
2. Following the seminar chair's appointment, seminar chair initiates an immediate discussion with the assistant region director on the process of seminar site selection. The seminar chair works with the assistant region director and event services company during the entire site selection process. No contact is made by anyone with any potential site outside of the event services company. The full site selection process is listed in Section III of the Region Seminar Guidelines.
3. Proposed dates should be checked against the master calendar through EGA headquarters before final dates are set. Schedules for other needlework events - Other EGA Regions, ANG, other national needlework events, etc. - should also be taken into consideration. When dates are confirmed, submit them to EGA headquarters for inclusion in the [master calendar](#). Signs "[Letter of Agreement for Financial Responsibility of Region Seminars.](#)"
4. Informs assistant region director regularly of all aspects of the seminar and its finances.
5. Provides reports as requested – prior to each executive and region board meeting and Border to Border deadlines.
6. Ensures that all documents are sent in a timely manner to assistant region director.
 - a) Meeting notices.
 - b) Minutes of all seminar committee meetings within 10 days of meeting.
 - c) Reports.
 - d) Final Seminar Report, including the Final Seminar Financial Report.
7. Appoints other seminar committee chairs and provides each with a copy of the workplan/budget, all seminar policies contained in Section 1 Policies and Procedures, Seminar Committee Chair Report Form, portions of guidelines and previous reports that will enable each to do their job.
8. Serves as ex-officio member of all seminar committees and works with all chairs to interpret region policy, answers questions and monitors all activities.

9. Works with seminar treasurer, region treasurer, and assistant region director to establish a workplan/budget, monitors loan monies and helps prepare workplan/budget revisions as needed.
10. Requests loan money according to time line.
11. Works with the dean of faculty to prepare the contract(s) and makes sure that the contract(s) are submitted to the region director for approval and signature.
12. Works with boutique/bookstore chair to negotiate contract(s), makes sure that the contract(s) are submitted to the region director for signature. NOTE: All contracts and services for region seminars, including faculty contracts, shall be approved, and signed by the region director. The region director is the last to sign the contract.
13. Assists banquet chair in planning all food functions. Presides at each banquet or special function.
14. Schedules wrap-up meeting during seminar or soon after.
15. Invites next seminar chair and committee chairs to attend wrap-up meeting.
16. Issues an invitation by for next seminar chair to accompany her to all meetings, functions, and planning sessions occurring during the seminar.
17. Prepares [Final Seminar Report](#) and [Seminar Summary Report](#) to be sent to the region director, assistant region director and the next year's seminar and retreat chairs within 120 days of the close of seminar. This report includes the complete [Final Seminar Financial Report](#)

B. Dean of Faculty

1. Reports to the seminar chair.
2. Signs [Letter of Agreement for Financial Responsibility](#)
3. Works within the budget, makes timely reports to seminar chair and seminar treasurer.
4. Maintains complete records: all correspondence, reports, questionnaires, expenses, and records of communications (Examples: phone calls, emails, etc.).
5. Is familiar with region seminar policies & procedures, region seminar guidelines and online resources from the EGA website.
6. Chooses a faculty selection committee consisting of at least five people and the seminar chair. The assistant region director and the region director are ex-officio members of this committee. The names of this committee's members shall not be disclosed.
7. Prepares letter of invitation to teach and/or an invitation notice in EGA publications and region newsletters 2 years prior to seminar.
8. Works with the seminar chair and region director to prepare a list of EGA and other prospective teachers to be invited.
9. Consults with seminar chair and region director to determine any special classes or lectures to be included. Teachers/lecturers do not need to be EGA members or even embroiderers. **NOTE:** Classes for judges or teachers in color and design may be partially subsidized by national. Check with the region director for latest information.
10. Prepares proposal packet to send out to interested teachers
11. Establishes a review system to be followed by the faculty selection committee.
12. Receives proposals and prepares them for review by the faculty selection committee. Verifies that teachers have sent items needed for consideration.
13. Before the faculty selection committee meets, prepares a list of teachers submitting proposals and sends the list to the region director. The region director forwards the list to the EGA National director of education for review.
14. Chairs the faculty selection committee. Compiles ratings for the selection of the faculty.
15. Sends the Letter of Acceptance to the selected teacher.
16. Together with the Seminar Chair, prepares the contracts for the selected teachers, sending them to the Assistant Region Director/Event Coordinator for review. After review, the Assistant

Region Director sends the contracts to the Region Director who uploads the contracts into DocuSign for distribution to the appropriate people.

17. Sends the Letter of Regret to non-selected teachers with return of proposals.
18. Prepares dean of faculty Checklist.
19. Prepares a teacher information packet, which includes request for teacher resume' and class description, Teacher Reimbursement Form and Faculty Schedule and Checklist for teachers and for the committee.
20. Arranges with faculty for class pieces to be displayed at previous year's event.
21. Compiles information from teachers for seminar brochure Sends pre-publication copy to teachers for approval. Sends brochure committee .jpgs of project photographs. Submits teacher resumes and class descriptions to the brochure chair. Arranges for a courtesy brochure to be sent to each teacher.
22. Maintains contact with registrar.
 - a) Monitors class size.
 - b) Contacts teachers as needed to cancel or change class size.
23. Visits seminar site with seminar chair to assign classrooms, if not cost prohibitive.
24. Notifies facilities chair and special equipment chair of any needs. Prepares schedules for equipment usage.
25. Plans a faculty meeting prior to the beginning of classes at seminar to:
 - a) Introduce angels
 - b) Discuss policies of seminar
 - c) Emphasize rule forbidding sales of anything outside of merchandise night.
 - d) Hand out Student Evaluation Sheets
26. Monitors classes during seminar and assists as needed.
27. Is responsible for and is the only contact person for faculty. That includes monitoring:
 - a) Transportation
 - b) Lodging in a member's home or extra hotel night(s) as needed
 - c) Kits, if sent by the teachers ahead of time
28. Prepares [final job report](#) to be sent to seminar chair within 60 days of close of seminar.

C. Seminar Treasurer

Duties:

1. Reports to event coordinator.
2. Signs [Letter of Agreement for Financial Responsibility](#).
3. Opens a checking account for the seminar and has signatory powers along with the seminar chair and seminar treasurer as well as an elected officer of the region board (one who lives closest to the host chapter). This account will be part of the bank accounts maintained by the region. The seminar treasurer will be responsible for ordering checks and the regular maintenance (writing checks, balancing statements) of the seminar account, once opened.
4. Cash, money order, or cashier's checks shall be required from members who have outstanding, non-collectible, returned checks payable to EGA. This policy applies to all levels of EGA; notification shall be made to all tiers. The charge for each returned check will be \$25.
5. Accounts for all monies received and all expenditures. Establishes and maintains a double entry bookkeeping system.
6. Prepares financial statements for event coordinator, each committee chair, region director on a quarterly basis until one year before the event and then the reports shall be submitted monthly.
7. Keeps the region director and event coordinator up to date concerning all aspects of the event finances.
8. Pays all bills promptly including faculty per diem, kit costs, teaching fee and travel where applicable.
9. Pays international teachers using a wire transfer from the bank. No checks or PayPal. There will be a fee for this service.
10. Deposits all monies upon receipt.
11. Sends [Reimbursement Request form](#) for distribution to committee chairs. Form with receipts are accepted for payment after review by the Event Chair and Region Director.
12. Writes and mails all Donation checks as needed to museums visited in an education event.
13. Verifies that the Social Security Number or Federal Tax ID(FEIN) numbers for all faculty are on file at EGA headquarters. Sends W-9 form to those who do not have numbers on file with the request to return it to EGA headquarters.
14. Files IC Payment Reporting information with EGA Headquarters within 14 days of close of event. Use most current forms on the National EGA website. [protected-ic_payment_reporting_form13_2.pdf \(egausa.org\)](#) Includes in packet if necessary:
 - a) Copy of contract for each faculty member.

- b) All receipts and memoranda used to compute check total.
- 15. Drafts [Final Event Financial Report](#) to be sent to the Event Chair within 90 days of close of the education event. This report shall also include copies of reimbursements, teacher/lecturer contracts, and the IC reporting forms for each teacher/lecturer.
- 16. Prepares event ledgers, checkbooks, bills, and reports for audit. The audit should be accomplished within 90 days of the close of event. Audit shall be conducted by at least two qualified region EGA members appointed by the Region Director or designee. Auditors could be former region treasurer, former event coordinator or treasurers.

Sends audit report to event coordinator within 90 days of closing of event

D. Seminar Registrar

1. Reports to seminar chair.
2. Signs “[Letter of Agreement for Financial Responsibility of Region Seminars.](#)” Works with seminar chair, treasurer, and brochure chairs to prepare a registration form. Alters this form to create an early registration form, as needed.
3. Receives names and other information on region scholarship winner(s) from region director.
4. Receives and handles early registration.
5. Receives class registrations from participants, recording postmark and assigning a registration number.
6. Works with seminar treasurer to record checks and/or credit card information received with registrations and kit fees.
7. Coordinates bank deposits with seminar treasurer. If registrar deposits receipts, registrar shall provide treasurer with a photocopy of check or credit card receipts, and registration forms or kit fee invoices and original copies of bank deposit slips and bank deposit receipts, retaining photocopies of these for registrar’s records.
8. Prepares a list of class assignments based on choice of participants and postmark. There shall be no preferential treatment for any participant.
9. Notifies dean of faculty and seminar chair of classes not meeting minimum registration requirement five days after last registration date.
10. Responds to inquiries concerning registration.
11. Prepares and mails seminar class assignment letters to participants, including Fee Statement and lodging reservation card. Sends the same information plus the teacher’s student letters to late registrants.
12. Prepares waiting lists and sends letters as needed.
13. Makes copies of class lists for dean of faculty to meet deadline for mailing to teachers.
14. Prepares list of participants and teachers, including mailing and e-mail addresses and phone numbers and provides the list to the handbook chair.
15. Prepares list of participants for various committees for any special events associated with the seminar, i.e., Merchandise Night.
16. Prepares registration packets, including tickets to special events and meals, handbook, etc. to be distributed at registration.

17. Arranges for a registration area, prepares procedures, and trains assistants to provide for a smooth traffic flow.
18. Is available to answer questions during registration at seminar.
19. Prepares [final job report](#) to be sent to seminar chair within 60 days of close of seminar.

E. Secretary

1. Serves as a member of the seminar committee.
2. Has read through and is familiar with the region seminar policies and procedures.
3. Attends all seminar committee meetings.
4. Records the minutes of all seminar meetings. These minutes are the permanent, official record of the seminar business.
5. Sends copies of the minutes to the seminar committee, the region director and assistant region director within two weeks of the meetings.
6. Keeps attendance records of the meetings.
7. Maintains an archival file of all minutes.
8. Sends copies of significant correspondence to the seminar chair, region director and assistant region director.
9. Maintains a contact list of all seminar committee members and sends updates to the region director and assistant region director, as needed.
10. Submits [final job report](#) to be sent to seminar chair within 60 days of close of seminar

Letter of Agreement for Financial Responsibility of Region Seminars

The seminar executive committee determines its own financial workplan and budget. Financial workplans and budgets shall be submitted on a regularly scheduled timeline to the region director, assistant region director, and the region treasurer for review and approval. The approval shall be reported to the region board of directors. The initial workplan shall be approved by the region executive board.

IF THE APPROVED BUDGET POLICIES AND PROCEDURES ARE FOLLOWED AND A DEFICIT OCCURS, THE HOST UNIT AND THE REGION WILL SHARE THE RESPONSIBILITY EQUALLY. IF A DEFICIT OCCURS BECAUSE THE POLICIES AND PROCEDURES WERE NOT FOLLOWED, THE RESPONSIBILITY LIES TOTALLY WITH THE HOST CHAPTER... *RMR, Policies and Procedures.*

The seminar budgeting process is an important planning tool of the seminar executive committee. However, the region board of directors has the responsibility of approving finances. The seminar executive committee collects and organizes financial information to assist in planning.

Please carefully read and review the policies and procedures of the Rocky Mountain Region and those of EGA relating to region seminars. Ask the assistant region director or the region director any questions where you feel clarification is necessary in order that you completely understand what is required of you. Then, sign, date, and return the original form to the assistant region director by **DEADLINE DATE.**

"I have read and understand the Rocky Mountain Region Policies and Procedures and those of EGA relating to region seminars. I understand the duties and responsibilities of my office and shall adhere to the policies set forth."

Seminar 'xx Chair_____Date_____

Seminar 'xx Dean of Faculty_____Date_____

Seminar 'xx Treasurer_____Date_____

Seminar 'xx Registrar_____Date_____

RMR Seminar/Retreat Coordinator_____Date_____

RMR Director_____Date_____

Sponsoring Entity (Region or Chapter)

Seminar Committee Chair Report Form

Complete this form and submit two copies to the seminar chair emailed on or before _____ (within 60 days after the close of seminar). Enclose a copy of any printed matter that was used as part of your job. Also, add any suggestions for future seminars, as well as what your job entailed including any duties performed that are not on the job description, and how you handled it. The seminar chair will compile these reports on a computer file and forward a copy electronically or via usb, one to the assistant region director and one to the next year's seminar chair.

Seminar Committee Assignment

Chair's Name:

Job Description: Outline responsibilities if different from those contained in the RMR Seminar Guidelines:

Expenses:

Procedure followed: (Include timeline and man hours involved)

Recommendations to improve or make the job easier:_____

Seminar Chair Report Form

Prepare an overview report of the seminar based on your view of every activity or committee duty, plus your responsibilities. Include your job description, outlining your responsibilities if different from those contained in RMR Seminar Guidelines. This report, including complete financial report and proceeds check to the region and chapter(s) are due to the appropriate people (RON Sec 3 Policies & Procedures) within 120 days of the close of seminar. The seminar chair will compile these reports in a computer file and forward a copy via USB or electronic file, one to the assistant region director and one to the next year's seminar chair.

Expenses:

Procedure followed:

Recommendations:

Seminar 20__ Summary Report

This is to be filled out by the seminar chair after the seminar. A copy is to be sent to the region director, the assistant region director, and the upcoming retreat and seminar chairs.

Dates of Seminar: _____ to _____

City and State: _____

Name of Seminar: _____

Host Chapter(s)/Unit(s): _____

Name of Chair: _____

Name of Site (i.e., hotel, college): _____

Address: _____

Phone number _____ FAX number _____

Name of Site Contact Person: _____

Non-refundable Fee charged: \$ _____

Registration Fee Charged: \$ _____ (minus non-refundable fee)

How many meals included? _____

Hotel/Venue Room Rate per Night: _____ Double occupancy? _____ Include breakfast? _____

Number of Early registrants: _____ Number of Regular registrants: _____

Number of Late registrants: _____ Number of cancellations: Early _____ Regular _____

Total Number of Attendees: _____

Number of Hotel Nights Used:

Pre-event _____ Night before opening day _____ Night of opening day _____

Night of last day _____ post-event _____

Food and Beverage Contractual Obligation Actual Amount: \$ _____

Room Rental Contractual Obligation \$ _____ How many meeting/class rooms used: _____

Arrival and Departure Patterns (i.e., air, car, early, etc.): _____

Seminar 20__ Summary Report (Page 2)

List Exhibits (not including Prospectors): _____

Teacher Fee paid (flat amount per teacher):\$_____

List Teachers, Class Title, Technique & the number of students in class **OR** if it was cancelled

Teacher	Class Title	Technique	# of students in class	Class cancelled

Number of volunteer hours (estimate) put in by everyone: _____

Amount and types of items donated and from whom (i.e., goods for door prizes, favors, etc.):_____

_____ Region Seminar
Treasurer Seminar Budget/Final Report
As of _____

		BUDGETED	RECEIVED TO DATE	BALANCE
REVENUE				
401	Registration			
402	Banquets Guest Tickets			
403	Merchandise Night			
404	Teachers showcase			
405	Tours			
406	Special Events			
407	Bookstore Revenue			
408	Boutique Revenue			
409	Teacher Kits & A V Fees			
410	Merchandise Sales			
411	Interest Income			
412	Other Revenue			
414	Region Loan			
TOTAL REVENUE		-	-	-
EXPENSES				
501	Banquets			
502	Hotel			
503	Convention Center			
504	Faculty			
505	Teacher Kit & A.V.Fees			
506	Audio Visual & Equip. Rental			
507	Tours			
508	Regular Activities			
509	Special Events			
510	Bookstore Expense			
511	Boutique Expense			
512	Brochure Publications			
513	Printing			
514	Publicity			
515	Administration			
516	Hospitality items			
517	Miscellaneous			
518	Region Loan Repayment			
TOTAL EXPENSES		-	-	-
EXCESS (LOSS)		-		

ROCKY MOUNTAIN REGION REQUEST FOR REIMBURSEMENT

Requested by: _____

Pay To: Name: _____

Address: _____

Date	Description/Purpose/Use	Phone	Postage	Printing	Other

Total Amount to be Reimbursed _____

Total Value of Gifts and Donations _____

For RMR Treasurer Use Only

Paid by Check# _____ Date Issued _____

Date deducted from Account _____ Check file page _____

Attach receipts to this form.