

THE UPLEDGER INSTITUTE FACILITATOR MANUAL

TABLE OF CONTENTS

<u>STATEMENT OF PURPOSE</u>	4
<u>SAMPLE DAY ONE TIME GRID</u>	6
<u>DAY TWO TIME GRID</u>	Error! Bookmark not defined.
<u>DAY THREE TIME GRID</u>	Error! Bookmark not defined.
<u>DAY FOUR (OR LAST DAY) TIME GRID</u>	Error! Bookmark not defined.
<u>PRIOR TO THE SEMINAR</u>	6
<u>TRAVEL DAY AND WORKSHOP PREPARATION</u>	7
<u>HOME OFFICE CONTACTS</u>	Error! Bookmark not defined.
<u>SALES/CATERING MEETING AGENDA</u>	8
<u>ROOM SET-UP REQUIREMENTS & FACILITATOR PREPARATION</u>	9
<u>ROOM SET-UP REMINDERS</u>	10
<u>HELPFUL POINTERS</u>	Error! Bookmark not defined.
<u>FACILITATOR PREPARATION</u>	11
<u>THINGS THAT MAY GO WRONG AND WAYS TO DEAL WITH THEM</u>	12
<u>"AFTER HOURS" EMERGENCY PROCEDURES</u>	Error! Bookmark not defined.
<u>REGISTRATION</u>	13
<u>DAY ONE</u>	Error! Bookmark not defined.
<u>DAY TWO</u>	17
<u>DAY THREE</u>	18
<u>LAST DAY</u>	19
<u>FINAL CLOSEOUT & PREPARATION FOR SHIPPING OF MATERIALS</u>	20
<u>SEMINAR PROCEDURES</u>	21
<u>DAILY REMINDERS</u>	21
<u>EDUCATIONAL MATERIALS DISPLAY AREA</u>	21
<u>HELPFUL POINTERS FOR DISPLAY</u>	22
<u>CRANIOSACRAL THERAPY SECTION</u>	22
<u>POINTERS FOR HIGHER SALES</u>	24
<u>MONEY BACK GUARANTEE</u>	29
<u>FUTURE SEMINAR REGISTRATIONS</u>	29
<u>REGISTRATION FORMS, CODES & PRICE SHEET</u>	31
<u>DISCOUNTS</u>	32
<u>TA VOUCHERS</u>	32
<u>STUDENT DISCOUNT</u>	32
<u>PRODUCT DISCOUNTS</u>	32
<u>ANNOUNCEMENTS AND HANDOUTS</u>	33
<u>CANADIAN CLASSES</u>	42
<u>CERTIFICATION</u>	43
<u>CRANIOSACRAL THERAPY</u>	43
<u>INTERNATIONAL ASSOCIATION OF HEALTHCARE PRACTITIONERS</u>	43
<u>CRANIOSACRAL THERAPY I</u>	44
<u>AV / ROOM REQUIREMENTS</u>	44
<u>HANDOUTS</u>	44
<u>REQUIRED READING</u>	44
<u>CRANIOSACRAL THERAPY II</u>	45

<u>REQUIRED READING</u>	45
<u>RECOMMENDED VIDEOS/MATERIALS</u>	45
<u>SOMATOEMOTIONAL RELEASE I</u>	46
<u>AV / ROOM REQUIREMENTS</u>	46
<u>HANDOUTS</u>	46
<u>REQUIRED READING</u>	46
<u>RECOMMENDED READING/VIDEOS/MATERIAL</u>	46
<u>SOMATOEMOTIONAL RELEASE II</u>	47
<u>AV / ROOM REQUIREMENTS</u>	47
<u>HANDOUTS</u>	47
<u>REQUIRED READING</u>	47
<u>RECOMMENDED READING/VIDEOS/MATERIAL</u>	47
<u>OTHER</u>	47
<u>ADVANCED CRANIOSACRAL THERAPY</u>	48
<u>SYMPOSIUM</u>	49
<u>DISCOUNTS</u>	49
<u>SHARECARE</u>	50
<u>HANDOUTS</u>	50
<u>DISCOUNTS</u>	50
<u>LYMPH DRAINAGE THERAPY 1</u>	51
<u>LYMPH DRAINAGE THERAPY 2</u>	52
<u>LYMPH DRAINAGE THERAPY 3</u>	53
<u>ADVANCED LYMPH DRAINAGE THERAPY</u>	54
<u>LDT'S LYMPHADOMA/CDP CERTIFICATION</u>	55
ADVANCED LYMPH DRAINAGE THERAPY 2	
LYMPH DRAINAGE BRAIN 1	
LYMPH DRAINAGE BRAIN 2	
LYMPH DRAINAGE BRAIN 3	
LYMPH DRAINAGE BRAIN 4	
HEALING FROM THE CORE: Grounding and Healthy Boundaries	
HEALING FROM THE CORE: Expanding Present-Moment	
HEALING FROM THE CORE: Release and Renewal	
HEALING FROM THE CORE: From Trauma Recovery to Ecstasy	
HEALING FROM THE CORE: Advanced Energy Dynamics and Apps.	
<u>ROOM SET-UP DIAGRAMS</u>	58
<u>SUMMARY</u>	61

STATEMENT OF PURPOSE

We have chosen you as a facilitator based on your desire for adventure and your enthusiasm to interact with our seminar participants. We believe in you and feel you have what it takes to be a fantastic facilitator.

The Facilitator's purpose is to help the instructors and serve the participants in order to provide the best possible educational experience for them. It is up to you to create a positive, professional, organized and stimulating environment in which the workshop will take place. You're responsibility is to ensure everything is ready for the instructor and the participants are satisfied. We depend on you to make it all happen smoothly!

From the moment you leave your home to facilitate a workshop you represent The Upledger Institute. Your conduct is important wherever you are. You may even want to carry some CST literature with you as you travel. You just never know who you may meet while you are traveling to the seminar.

Through word-of-mouth, workshop attendance will grow. Try to speak to each participant to help them feel welcome and let him or her know they are important to us. It is VERY important to pay attention the the details. Your service to the instructor and the participants is paramount. We keep track of everyone's performance and acknowledge those whose sales are strong. Remember an informed customer buys. So knowing the products and how they can be useful to the participant and their practice will be a big advantage in increasing sales.

We are count on you to be the eyes and ears of The Upledger Institute. Therefore your return paperwork is valuable and needs to be as accurate and complete as possible. The Facilitator Report is a detailed description of the class participants and instructor's performance, as well as your impressions of the overall group dynamics. This report is part of your facilitator packet and is to be turned in with your final package at the end of the workshop. Or if you are not local to PBG, FL, the final paperwork should be Federal Expressed to our office ASAP. If you are unsure or are uncomfortable with writing something in the Facilitator Report, please do not ignore it. Contact the Upledger Institute and speak to your facilitating contact there. Remember we are only a phone call away.

HOME OFFICE CONTACTS

(800) 233-5880	UI 800 Number
(561) 622-4334	UI Local Number
(561) 622-4771	FAX
(561) 622-4334	Nightline. Enter party's extension once the tape begins or the #1 to reach all phones.
	Jill Randall x 1352
	Donald Duncan x 1370
	Gail Barton x 1331
	Reception x 1300
Education Services	Michele Metzger x 1323
	(Cell # 561 714-2232 for emergencies only)
	Bryna Mellott x 1322
TA & Study Groups	Jean Winters x 1373
Business Development	Melinda Glasco x 1315
Conventions, Speaking	Dany Ramirex x 1389

AFTER HOURS EMERGENCY PROCEDURES

We are open 8:00 a.m. to 6:00 p.m. (ET) Monday through Friday. Check in with us prior to your workshop within these hours. Should you have a problem that needs to be discussed outside of these hours, please follow the following guidelines:

CRITICAL SUPPLY SHORTAGE (study guides, air mats) Call Michele Metzger on her cell number at 561 714-2232. Leave a voicemail with a phone number where you can be reached (speak clearly and slowly and repeat the phone number) The call will be responded to as soon as possible. If you do not get a call back you may try my home phone number at 561 630-9033.

We ask that questions regarding product pricing, shipping return, etc., be addressed during normal business hours.

Don't forget you are expected to call UI at least ONCE a day (M-F). If you have any problems on the weekends consult the above numbers.

Meeting site questions or problems are to be directed to the meeting planner in charge of your seminar. Unless you learn otherwise, the hotel has guaranteed the prices we have given you for sleeping rooms, A/V, meeting rooms and food and beverage. Consult your contracts provided in your facilitator packet and only sign bills where the items billed match the costs on the contracts.

It is important for you to know that everyone at UI will do his or her best to assist you. You are not alone out there. We're only a phone call away.

FACILITATOR AGENDA

PRIOR TO THE SEMINAR

Make the following arrangements once you have been confirmed as a facilitator in a class:

1. Book your airline tickets with Travel Concierge. Let the agent know as soon as possible where you will be going so they may take advantage of any special discounts that may be in effect. If you have not arranged your travel 30 days prior to the seminar it will be booked for you.
2. Notify Distribution if you need a facilitator kit, or supplemental supplies. You will need the following: air pump, box cutters, red pens, blue or black pens, rubber bands, post-it notes, scissors, stapler, and tape. Also helpful is white board markers and flip chart markers, extra receipts and extra box ties.
3. If you are in-office staff, let administration dept. know when you will need to have your facilitator packet ready, or if it needs to be shipped to the seminar location. For Canadian classes, the packets will be shipped. Please verify the ship to address prior to the class.
4. Your confirmation letter will indicate the recommended travel from the airport to the meeting site. Sometimes it is necessary to arrange your transportation in advance. This information will also be available in your facilitator packet as a print out of the class information and notes for the class.
5. A few days before traveling to the seminar, please check with the Meeting Planning contact for the class to determine if there are any room turn-overs during the class, as well as time that you will be able to set up. Verify the name of the hotel or meeting site contact and their phone number and any other information you may need.
6. Verify that you have your airline ticket and any travel documents that may be required. PASSPORTS are required for Canada as well as the paperwork for a work permit that you may need to obtain when crossing the border. For questions on this please contact the UI Field Manager for details.

Pack: facilitator packet (class paperwork), facilitator kit (office supply items), airline tickets etc. As stated above, some of these may be shipped to the class location for you.

TRAVEL DAY AND WORKSHOP PREPARATION

1. If flying to the seminar, make sure to arrive at the airport early enough to have plenty of time to check in and get through security. Remember, since many of the items in the facilitator kit are sharp, you will have to check your facilitator kit, or at least put these items in your checked portion of your luggage. There are also restrictions in the amount of liquids and gels that you can take on board. Double check with the current requirements, and put these items in your checked luggage if necessary.
2. When you check-in at the hotel, introduce yourself and let them know you are the on-site contact for The Upledger Institute seminars being held there. (Unless of course the seminar is held at a location elsewhere.) If possible, present them with a business card. Make sure you are checked-in at the current rate or contracted rate, whichever is lower. Ask if there is a fax for you. The final rosters of the class will be sent on the afternoon before the class. If it has not yet been received, check back later. You will need this information to verify the total number of students and TAs and balances that are still due. **YOU ARE RESPONSIBLE TO COLLECT ANY BALANCES STILL DUE** before the class begins. If the participant is a student and brings verification of their status as a student, please include that with the final paperwork.
3. Make sure the front desk has reservations for the instructor, also at the lowest rate. Double check the room type (i.e., single, double) with your contract. Explain to the front desk that this is a very special person and that he/she should be treated well. Ask if they have arrived. If they have, call their room to say hello or leave a message with your room number in case they have any questions or need to reach you.
4. Remind the front desk that the direct billing account for both you and the instructor is for room and tax only. Incidentals (phone calls, movies, etc.) are the responsibility of the individual. There may be exceptions for incidentals for Dr. Upledger, or other special guests. The hotel will request a credit card imprint or cash deposit from you for your incidentals. It is best to use a credit card NOT a debit card. If no incidental charges are made there should be no charges to your credit card.
5. Take time to speak with the concierge/bellman/front desk and learn about the area. Many participants are interested in learning about vegetarian restaurants and may ask you. Ask for restaurant guide handouts for your display area.
6. Get settled in your room. Take a look at the paperwork and double check the names of the contacts. Call them and arrange an appointment to meet with Sales & Catering &/or Banquet manager (whoever is responsible for the meetings). You will be reviewing the details of the workshop setup and requirements at this meeting.
7. Take time to speak with the concierge/bellman/front desk and learn about the area. (The airport shuttle drive may also be a good source for information on areas of interest around the meeting site location). Many participants are interested in learning about vegetarian restaurants, things to do, etc. Ask for restaurant guide handouts for your display area. Discover what the hotel has to offer. Look around to find stores, lounges, pool area, etc.
8. It is important to verify that all the boxes of inventory arrived and that you have everything you need soon after arriving at the meeting site. Even if you cannot set up the meeting room(s) until later in the evening, it is best to locate the boxes and make sure the staff knows where to deliver them for you to begin your set up. Try to locate at least the boxes of study guides and essentials, so if any are missing,

you can contact the office immediately. For EMERGENCIES: Distribution can be paged at 800-233-5880 x1511

9. Meet with Sales/Catering. The meeting should last approximately 15-30 minutes.

SALES/CATERING MEETING AGENDA

1. Introduce yourself and give them your business card if possible. Visit **the meeting room(s)**. Hotels can misquote room sizes; so it is important the room looks the right size. If there is just 1 class being held and the product display is inside the room then UI will try to book 500 square feet per every 10 people. This will only work with 6' x 30" tables. More space is needed if they only have 8' x 30" tables.
2. **Verify 'turn-overs'** (other events happening in the room at night) that may be happening during the course, or if we have the meeting rooms during the whole time with no turnovers. Ask if we have the meeting room as long as needed or if we need to vacate by a specific time on any day. If so, you will need to advise the instructor of this since many times the workshops run late.
3. **Reconfirm the final number of tables needed for both students and the TAs.** For CranioSacral Therapy workshops, the tables **must be** 6' x 30". (If space is tight, or 6' x 30" tables are limited, skinny 18" classroom tables can be used for the teaching assistant's tables.) Note any exceptions to table size on the contract.
4. **Find out what time they will be setting up the classrooms. If at all possible, be present for set up.** It will make it much easier for you and the hotel staff and save making changes later. If for some reason you can not set up in the meeting room the night prior to the seminar, ask if they have another room available for you to prepare (i.e. open up boxes, blow up air mats, etc). If you can't be in the room during set up, discuss set up with the staff so they are absolutely clear how many tables are required and how you want them placed. It may be helpful to draw a diagram once you see the actual room and determine how you want it set. Angle outside rows of tables for better viewing.
5. Have the hotel locate the shipment from UI and **request that these boxes are delivered to your book display area.** Always check the number of boxes that arrived matches the number shown as shipped by UI. If there is a discrepancy you will want to handle this right away.
6. **Ensure your display tables can be secured after class hours or stored in the meeting room overnight.** If not ask if a "Queen Mary" cart with shelves may be available. This will allow you to easily stack the books etc, in onto the cart so that it can be wheeled and locked in a secure location. Hotels will NOT pay for stolen items!!!!
7. Explain to the meeting site contact that there will be **several boxes left over after the seminar that will need to be stored for a couple of days before being picked up by FedEx.** You will have these boxes labeled, taped and paperwork ready and all they need to do is store them. FedEx labels will be found in a manila envelope marked HWP (hundred weight packet) with the product inventory.
8. **Review food and beverage details from the contract.** Explain that our participants will most likely consume more hot water, HERBAL teas, lemons and honey than regular and decaf coffee. Therefore they will need to be prepared with ample amounts of these items on hand during the classes. Remind them to check with you before making any refills to the beverages. All courses will have ice water in the rooms (or by your coffee table) throughout the day. Typically, meetings will have a continental breakfast on day one only. Coffees and teas will be available each day through the morning break

only. Discuss the times the staff needs to refresh beverages and clean up the area. Don't let them tell you when they will be there, you tell them when they are needed. Watch the staff to ensure they do not deliver more catering than is necessary. We only want to pay for what we order!!

9. **Ask them to make the reader board direct all the participants to your book-table area for sign-in** on the first day and not to the actual meeting room.

ROOM SET-UP REQUIREMENTS

The following are guidelines. Each instructor may have preferences that are noted on the Banquet Event Orders (BEO). Please use the BEO for specifics that are not listed here.

Tables:

- Participant Treatment Tables
One table for every 2 participants (CSI, CSII, LDT1-3, LDB1-3)
One table for every 3 participants (SERI-SERII, TBS, CSIR, CSRP)
CSP – is either 2-3 per table. Check with instructor or meeting planners
HFCC – circle of chairs + tables for 2-3 per table. Check with instructor
SERII – circle of chairs + tables for 3 per table for work after lunch
Size: 6' X 30"
Tablecloths
Air mattresses
10 extra stacked chairs in corner
- Instructor Head Table – Skirted
One 6' X 30" or 8' X 30" table at front of room
- Instructor AV table (may or may not be needed – check with instructor)
One small cocktail table, or short AV cart.
- Display Tables – Skirted
Eight -twelve 6' X 30" or 8 x 30 tables (put together to make an "U" shape)
Two or more 6' X 18" table inside the "U" as a desk/work area.
Tables to be individually clothed (for easy moving) with skirts on outside
Located at back of room or in common area for multiple classes
Two- four 6' X 18' tables in back of "U" shape (up against the wall) for "shopping bags"
2 chairs
2 garbage cans
Extra tablecloths (to drape over your crates to create added display area & to cover at night)
Two or more 6X30 or 8X30 tables for sign-in. These can then be used for literature and laying out the name tags for the rest of the weekend.
- Food/Water Tables
Two or three large tables skirted to the rear of room or display area
Garbage cans and tray(s) and stand(s) for dirty dishes

ROOM SET-UP REMINDERS

1. Participant tables need to be at least 2 feet from wall for access to all sides.
2. Glasses for water are to be located in back of room with ice water and not on the participant tables. No pens, pads of paper etc. are to be placed on the tables.
3. Check table sturdiness and be sure all legs are locked and secure.
4. Make sure you have plenty of chairs for teaching assistants and extra chairs for stacking in each corner of the room.
5. Check white boards, flip charts and markers are set up as indicated on contracts (BEOs) and that there are appropriate markers and erasers as needed.
6. See that all electrical cords to AV equipment are taped down
7. Check lighting controls
8. Check temperature controls
9. Check sound control for microphone and from outside sources or other rooms
10. Check for closest house phone to your book table display. Find out if there is a special extension or person to ask for when you are in need. If the meeting room contains a phone (usually on a wall) instruct front desk not to ring this phone during the workshop unless it is an emergency.
11. Sometimes a microphone is necessary. In these cases the instructor should bring their own lavalier but the hotel will need to provide a lavalier extension cord. Ensure that it is in working order and sound level is good. If there are any problems, AV or maintenance should be able to help.
12. Find the restrooms so you can direct participants during the course.
13. Make sure you have the necessary items for the seminar unpacked as soon as possible. This will include study guides, air mats, gloves, etc. Refer to the Course Requirement section in this manual for a list of essential items for each class.

AIR MATS & BOOK DISPLAY SET UP

- If not already done, count the boxes received and account for them on the inventory sheet.
- Open all boxes and remove packing paper. Save this paper for repacking the left over items at the end of the seminar. As the banquet dept for either a Queen Mary or regular banquet cart. Unpack the items and put on the cart in sections by category. This will make it easier to set up your display. The empty crates (and if necessary the empty boxes) can be used as ‘elevators’ for your book display table. Use extra table clothes received from banquets to cover them. You can then place items on top of the covered crates, up against them and flat on the table in front of them. This will create an attractive display and hide your work area on the skinny table behind the covered crates.
- Inflate the air mats using your air pump. Inflate one extra air mat in case one goes flat.

HINT: Unfold all air mats and lay them on top of each other with small plug closed and large plug open. To make it easier, place the air mats either on top of a table or on the floor but up against the wall. This will give you leverage when trying to close the plug so that less air escapes. Hold the air pump up to the large plug until air mat is full. Close up large plug and set air mat to the side until all are filled. If there is not enough air in them you can blow mouth to plug through the small plug. If for some reason you do not have an air pump, check with the hotel. Many times maintenance department will have an air compressor that you can borrow.

- Place an air mat in front of each participant table facing instructor table.
- Double check the number of study guides to ensure that you have enough for the number of anticipated participants. Place them by the table to be used for sign-in.
- Set up sign-in table near the entrance to the meeting room(s). Lay out the sign-in sheets side by side alphabetically. Place the name tags above the appropriate sign in sheet. Place a red pen next to each sheet. We typically use red pens to make it easier to see the corrections that need to be made in our computer system. Check the final roster that has been faxed to you. Receipts for any balances due should be folded and tucked into the appropriate name tag to be collected once they sign-in. Extra blank name tag cards and holders are given for last minute registrations or lost name tags etc.

THINGS THAT MAY GO WRONG AND WAYS TO DEAL WITH THEM

1. **PROBLEM** You missed your flight. (DO NOT MISS YOUR FLIGHT!)
SOLUTION Call UI or airlines if UI closed to make alternate arrangements.

2. **PROBLEM** You are delayed at the airport, and will be arriving late.
SOLUTION Call the hotel and have your meeting with the Sales/Catering staff over the phone.
 Make sure all the boxes have arrived and are delivered to the set up area that night.

3. **PROBLEM** Facilitator package did not arrive
SOLUTION Call UI and have the Single Roster, Sign-In Sheet, etc. faxed to you.
 Buy blank nametags and hand write them for first day. First check with the hotel to see if they have extras that you can use.

4. **PROBLEM** Air mats did not arrive with shipment.
SOLUTION Call the home office and find out when the boxes should arrive. Track if necessary.
 If the air mats are arriving the first day of the workshop ask for blankets that can be used to cushion the top of the tables until air mats arrive.
 If you are unsure when the boxes will arrive: Call all camping, sporting & department stores to
 - a) Rent air mats (get approval first)
 - b) Buy air mats (get approval first)
 - c) Ask participants and staff to bring massage tables
PROBLEM Study guides did not arrive with shipment
SOLUTION Call the home office and find out when the boxes should arrive. Track if necessary.
 If they will be arriving the first day of the workshop, the pages can be faxed to you. You will then need to copy them for each participant.
 If they will not be arriving, check with the home office for solutions dependant upon individual situation.

5. **PROBLEM** The hotel does not have 6' x 30" tables.
SOLUTION a. Use two 6' x 18" put together and make sure they are clamped or taped together to ensure stability
 b. Have the hotel rent tables
 c. Have participants bring in massage tables.

6. **PROBLEM** You are short air mats.
SOLUTION a. Call the teaching assistants or local participants and ask if they can bring in air mats or massage tables.
 b. Use blankets from hotel.

“After Hours” Emergency Procedure:

We are open 8 a.m. to 6 p.m. (ET) Monday through Friday. Check in with us prior to your workshop within these hours. Should you have a problem that needs to be discussed outside of these hours, please follow the following guidelines:
CRITICAL SUPPLY SHORTAGE (study guides, air mats) Call 800-233-5880 x:1369 and leave a message with what the emergency is and someone will get back to you as soon as possible. You can also contact Michele Metzger at 561-714-2232 (cell) or 561-630-9033 (home). We ask that questions regarding product price, shipping return, ect., be addressed during normal business hours.

DAY 1

REGISTRATION / SIGN-IN

1. Check that the hotel has properly listed the time and location of your seminar registration area on their public boards and TV monitors. Be sure the location and time posted is for the registration area and NOT the classrooms. Participants will come to the registration table first and then can be directed to the seminar room after they sign-in. Also make sure the time posted by the hotel is the **start** time of registration, and **not** the hotel set-up time. (i.e. registration at 8am and seminar starting at 9am)
2. Have the following items easily accessible and neatly organized:
 - charge machine
 - receipts (see reports on how to fill out a receipt)
 - pens/pencils and notepads
 - single roster
 - extra blank nametags
 - flair/calligraphy markers (in case you need to make a name tag)
 - Cash bank should be ready for use. Use this as a cash register and place receipts separate from the money. It is mandatory to keep a \$50.00 bank. \$50.00 (1 - \$10.00/4 - \$5.00/17 - \$1.00/\$3.00 change) Please use this bank as a cash register for all sales.

Use red pens for sign-in. This makes it easier for the home office to make corrections to the participants information. Introduce your self and ask the participant to verify all their contact information on the sign-in sheet and advise them that we would appreciate them wearing their nametag throughout the workshop. The "# Nights" on the sign-in sheet is the number of nights the participant is staying at the hotel. This information will be used to negotiate better rates for everyone in the future.

Position the Study Guides out of participants' reach. Hand them a study guide when you greet them and collect final payment if necessary.

THE FOLLOWING TIMES, DAYS, AND ANNOUNCEMENTS LISTED ARE FOR CRANIOSACRAL THERAPY I. YOU WILL WANT TO MODIFY THEM ACCORDING TO THE CLASS YOU ARE FACILITATING USING THE INFORMATION LOCATED IN TIME GRIDS SECTION.

If you have everything set up ahead of time-

- Have maintenance unlock the room and make any needed adjustments.
- Double check AV items have arrived and are working. If there are problems, phone catering, maintenance or whoever is needed immediately. Set up the microphone.
- Ensure you have any white boards, flip charts with markers and erasers as needed per BEO.
- Adjust room temperature if needed.
- Make sure that there is ice water and glasses in the meeting rooms

7:30 Check breakfast table for those courses with catering needs. Continental breakfast should be set by 7:30 am and consist of croissants, breads, muffins, bagels, etc. Remainder of Mornings will be beverages only. Make sure to have more hot water and herbal tea than coffee along with honey and lemons. Trash cans and trays for dirty dishes should be available in the area.

8:00 Participants arrive

Participant Registration:

- Greet each participant.
- Have them verify their name; address, phone(s), email and PROFESSIONAL TITLE (If there is anything missing, please have them complete it.)
- Have them sign in under their name after verifying the information.
- Have them answer all email questions.
- All outstanding balances should be collected. Subtly inform each participant with a balance they still owe for the class. You are to collect all unpaid balances or have an explanation for them when you return your packet. Exercise tact when doing this. A mistake may have been made on our end.
- Direct them to the appropriate meeting room and let them know that there is a continental breakfast for them to enjoy.
- If the participant forgot to sign in and you know they are present write "here" on signature line.

Teaching Assistant Registration:

- Introduce yourself and hand them the teaching assistant's student evaluation form. Make sure that they check their contact information and sign-in on the sign-in sheet. Teaching assistants may have an updated study guide if they do not have one. However, it may be advisable to wait until ALL participants have arrived (usually after the morning break) to be sure that you have enough study guides.
- If the instructor is meeting the UI staff, direct the teaching assistants to the meeting.

Instructor Check-In

- Introduce yourself. Remind them of any turn-overs that may be happening during the course.
- Hand them their nametag.
- Give them the class listing and tell them that you would be happy to cross off any no shows after registration closes.
- Also remind the instructor that you would like to introduce yourself and make announcements to the class before they start the seminar or as soon as possible that morning.
- If you don't get a chance to speak with the instructor, ask a TA to come and get you for introductions when they are ready.

8:55 Make instructor aware of how many participants have yet to arrive.

9:05 Instructor or facilitator opens workshop with introductions (see Announcements).

If late participants enter during your introduction note them and quietly bring them their Study Guide (if applicable) during the instructor's opening remarks. Then sign them in during the first break.

9:10 If possible, listen to instructor's opening remarks and the participant introductions. This is a great way to get to know the participants and will help when making conversation with them and knowing what items they may want to purchase.

FIRST MORNING ANNOUNCEMENT:

- Introduce yourself again and state your purpose for being there
- Explain the "shopping bag technique"

- Let them know where the rest rooms are located
- Let the participants know that we will be collecting their name tags at the end of each day and that they will be available to be picked up each morning. Explain that it is important for them to wear their name tags at all times so that you and the instructor and TA can get to know them. It is also a way that we take “attendance” each day since sign-in is on the first morning only. Tell them that there will be a bag with loops taped to the back of the door on which they can neatly hang their name tags.
- Remind them that some states require us to electronically send their CEU information to CE Broker and that we need their professional license information in order to do so. The professional license sheet will be set out each morning next to their name tags for them to check or write their information on to be input into the UI computer system.
- Offer information on area restraints
- Let them know that they are responsible for their own items and not to leave any valuable items in the class overnight, and to keep watch on them at all times, etc.
- Inform them that you will be back with other announcements throughout the class, but that we appreciate them for being there and that we welcome them to the class!

9:30 Registration Close

- Undrape the display table. Get organized for the student’s morning break!
- Call the registrar at the home office in charge of your seminar with any no-show confirmed registrations and resolve balance discrepancies. They will try to contact them right away. Please call back within the hour to obtain the results of their calls. This procedure serves three purposes; 1) saves a registration by reminding a forgetful participant of their commitment 2) the facilitator knows exactly how many people to expect for the remainder of the class and make plans accordingly 3) home office can call people on the waitlist to let them know a space is available in the course. If your course begins on a weekend day, call any confirmed no-show participants and remind them of the class. You also need to call any students that do not return to class any of the remaining days and ensure that everything is all right.

Mark “X” or “TRANSFER” on the sign-in sheet for those participants who do so. Remove these participant's certificates from the instructor's packet and cross their names off of the instructor's class list. You may now give the instructor's packet to the instructor.

- If you are missing a certificate for a participant or if their information is incorrect note this on the Activity Log and a correct certificate will be mailed to them.
- Count the remaining study guides and note on the special receipt included in the facilitator packet. Mark the number of study guides received and study guides to be returned.

10:15 Check refreshment table to see that everything is clean.

10:30 Morning Break – mingle with participants and answer questions about books and materials on display. Explain the “bag technique” to those interested in purchasing something right then. Take care of participant and instructor requests.

10:45 Workshop Resumes.

12:00 Make announcements before lunch.
Participant lunch break - be sure restaurant has been alerted.

12:30 Participants will start returning and will look over the display table.

REMEMBER: SALES ARE ALWAYS STIMULATED WHEN YOU HAVE AN INFORMED CONSUMER!

1:30 Workshop resumes

1:35 Coordinate sales receipts and money collected. Educational material sales and workshop registration payments must NOT be combined on the same receipt. Make sure the form of payment, either the check or credit card number, is written on the receipt. Collect taxes where applicable. Double check the TAX information sheet in your facilitator packet to confirm the amount of tax you will be responsible for collecting.

Florida	6.5% (products only)
New Mexico	6.19% (products and 5% seminars)
Canada	5% (products purchased in Canada and seminars)
California	differs by county (products only)
Texas	differs by county (products only)

These change periodically. Always check tax sheet in facilitator packet for correct tax percentages.

RE: CHECKS: Review checks for date, signature, paid to, amount, name, address and phone number. Canadian Checks must be labeled "US Funds". Check Travelers Checks for payee's signature.

RE: CC IMPRINTS --Check credit card slips for imprint clarity, account number, valid expiration date. You need to mark through the card number ON THE TOP/CUSTOMER COPY with a black permanent/sharpie marker so all but the last 4 digits of the acct # is showing.

3:30 Afternoon Break – SELLING TIME

3:45 Workshop resumes. Complete paperwork and begin participant reports.

- a. Pack up the most expensive educational materials (painted skulls, lady bugs, q-links etc) should be taken up to your room.)
- d. LOCK ROOM--if the room cannot be locked, move everything to a secured room for the night.
- e. Take any portable A/V equipment to your room. We have had equipment stolen out of meeting rooms in the past.

It is important to sign the catering bill daily. Resolve any discrepancies with the home office during business hours. At the seminar, your memory of the exact amounts consumed can ensure you are billed accordingly. If there is any equipment not being used by the instructor, ask that it be removed so UI is not charged for it.

If the bill cannot be verified and signed, document any discrepancies and have a hotel employee sign, preferably the contact, as well as yourself. Leave one copy for the hotel contact and send one copy back to the home office. If you disagree with a portion of the bill, such as catering charges, and have discussed it with the hotel contact to no avail, initial the part of the bill that you agree upon and have the hotel contact follow it up with the meeting planner in charge of your seminar. Document the discrepancy and make the meeting planner aware of the situation as soon as possible.

Document any incidents that occur while at a meeting a table breaks, employee drops TV, stolen books, etc. Documentation and signatures while on site saves numerous phone calls and hard feelings.

DAY TWO

8:00 Set up display table (should be done every morning before the seminar starts)

- Lay out name tags
- Check air mattresses for firmness
- Check beverage table
- Check room temperature
- Pass out any necessary Handouts

9:00 Open Workshop with announcements if applicable.

Day Two is a good day to hang the display cards announcing future seminar dates. You may want to write "WAITLIST" next to full classes and indicate classes that are almost full on the signs. This will encourage participants to register early. Any waitlist registrations you take must have a date and time of registration on the receipt.

CSI: If the instructor is NOT using power point, remind the AV staff that you will require a slide projector and screen the following morning. Also, if applicable, you can use your laptop computer for showing the 10 Step Protocol DVD during lunch time of day 3. If you do not have a laptop, talk to some of the participants about bringing in a DVD and TV to use to show the DVD. You may give to them a free 10 Step DVD to thank them for doing this for us!

CSI: Give the Intercranial Membrane Model and the CV4 hand out to the TAs at some point during day 2. They will be giving them to the participants at the end of the day as they are leaving.

CSI: If applicable, announce to the class that they may want to bring their lunch the following day to view the 10 Step Protocol DVD during lunch.

CSII: may be interested in viewing The Hard Palate DVD System.

DAY THREE

8:00 Prepare everything for 9:00 starting time (as on day two).

CSI: If applicable, make sure the slide projector is working and put the slides in the carousel. Make sure to leave a blank space between slide #15 and #16.

CSI: Hand out \$100 coupon on next level course if applicable, along with a Discover brochure, and the Peanuts cartoon. These can all be collated together prior to this morning. For easy handling, put the \$100 coupon on top of the Peanuts cartoon and tuck it into the Discover CST brochure.

9:00 Open the workshop with any pertinent announcements that may need to be made.

9:30 Check beverage table. Order more beverages as needed from banquets.

10:30 Morning Break. SELLING TIME!

12:00 Show DVD during lunch break.

1:30 Announcements:

Future workshop dates and \$100 discount coupon on the next level class.

Encourage people to begin closing out today (which will save a mad rush on the last day)

Hang sign encouraging participants to begin closing out. (saves a mad rush on last day)

CSI: Explain the CST STARTER KIT – and the amazing savings on these items that can help them start utilizing CST in their practice right away!

\$200 OFF COUPON EXPLANATION: These discounts are only available on non-residential classes taught in the United States and Canada.

At CSI Class	\$200 Discount off CSII	Requires a \$300 Deposit
At CSII Class	\$200 Discount off SERI	Requires a \$300 Deposit
At SERI Class	\$200 Discount off SERII	Requires a \$300 Deposit
At LDT1 Class	\$200 Discount off LDT2	Requires a \$300 Deposit
At LDT2 Class	\$200 Discount off LDT3	Requires a \$300 Deposit
At LDT3 Class At LDA1 Class	\$200 Discount off LDA1	Requires a \$300 Deposit

Remind your catering contact that you begin early on the last day and will need your beverages ready by 7:00-7:15 (Most courses).

LAST DAY

- 7:00 Prepare for an 8:00am starting time.
CSI: Hand out the CPT code hand out.
ALL CLASSES: Hand out evaluation forms (check with instructor first since some like to hand at at first break. Tape a bag to the door in back with "Evaluation" on it for participants to put completed evaluation forms into.
- 8:00 Open workshop with announcements:
Make participants aware the display table will close after their morning break and they will need to make their final purchases and close out with you at that time. While packing, leave a few receipts out for last minute registrations and air mat sales.
- 9:10 Show the Brain and Spinal Cord Center Video Tape, explain briefly about The Healthplex and The Upledger Foundation (Check with instructor)
- 10:00 Check beverage table. Order refills if needed.
- 10:30 Morning Break. Sell books.
- 12:00 Lunch Break. Have all bags and receipts closed out before they leave for lunch. Hand out participant evaluations to participants if you have not already made arrangements on Day 3 and will be staying through the end of the seminar. During lunch, if you still have the VCR, play any video a participant would like to see.
- 1:30 Workshop final session begins. Explain how important the workshop evaluations are to the home office. Be sure to collect these from every participant & TA. Collect the teaching assistants' participation evaluations. Start packing up books quietly.
- 3:30 Workshop ends. Ask participants to let the air out of their mattresses.
- Facilitator must be present to bid farewell to participants and handle any last minute requests. If someone wants to register for a future class, be available even if you have packed up the display table.

FINAL CLOSEOUT & PREPARATION FOR SHIPPING OF MATERIALS

- Pack books in and figure out how many air mats were sold and how many crates will be needed for the leftover air mats and mark the contents of each on the inventory sheet. Cover the tops of books with the remaining bags or packing paper and seal tightly. Mark each box. All boxes should be marked with the class information and the box # out of total boxes to be returned (CSI 1-18-11 POR [1 of 8]) so Distribution will know how many boxes to expect. Use sturdy boxes.
- Pack up the air mats by laying them on a table and folding them neatly. This will make it a lot easier to pack and save room. When you seal the boxes, make sure you put a piece of cardboard on top of the air mats. This is done so the air mats are not slit when the box is opened.
- Pack your facilitator kit and bring it home with you. The kit is the facilitator's responsibility. You must carry (not ship) it to and from each workshop you facilitate.
- Keep an accurate Inventory Sheet. This should be completed at the close of the seminar. It is extremely important to count your beginning and ending inventory and mark the exact number of supplies in each box that will be shipped back to UI.
- Use the Pre-printed labels with the next destination for the supplies will be found in the Hundredweight package located in your boxes. In most cases, the supplies will be returned to the home office.
- Make sure the hotel is aware that the boxes will need to be stored until the shipper can pick them up, typically 2 or 3 business days.
- Your final packet is to be completed and turned in the day following the seminar. Give to home office when you arrive in Palm Beach or send via Federal Express if you do not come back to Florida. Do not send cash in the Federal Express package. Either write a personal check in exchange for the cash you collect or obtain a money order to be sent for the cash.
- Leave a voicemail for Distributions stating the number of boxes to be picked up and where they are located. Call 1-800-233-5880 x:1368 and leave a message with your name, the city where you were working, the number of boxes/crates to be packed up and beginning and ending tracking numbers.

SEMINAR PROCEDURES

REMINDERS

- One of the most important things is to **make your announcements!** See Announcement section for samples of what to say.
- It is the facilitator's responsibility to sign the food and meeting room charge slips at the hotel. Bear in mind when you sign it, you are giving your authorization that the figures and totals are all correct. Take the time to double check the calculations before you sign - your name is on it! Attach these to your hotel evaluation.
- Make sure you balance your receipts with your money.
- Pick up name tags every night and have them out every morning where participants can easily see them. Put them close to your book table to increase sales.
- Contact the home office every day (except weekends).
- Dress professionally.

EDUCATIONAL MATERIALS DISPLAY AREA

The display table is to be neat and orderly at all times. Have materials attractively displayed.

DISPLAY TABLE

Other than the educational materials, you should have the following supplies:

- Receipts
- Ballpoint Pens (5-10)
- Book Price List
- Book Description Sheet
- Calculator
- Cash Bank
- Credit Card Machine
- Future Workshop Schedules
- Shopping Bags (SEE BAG TECHNIQUE)
- Stapler
- Tape
- Box Cutter
- Rubber bands
- Post It Notes

The "BAG TECHNIQUE"

Establish an account for participants as they choose their items to purchase. Fill out a receipt and attach this to an open bag. Even on a shipping order, fill out a receipt and attach it to a shopping bag in hopes that they will buy more. Place the products in the bags and line the bags against the wall in alphabetical order by last name. Usually 1 or 2 classroom tables up against the wall behind your table are sufficient for this. Try to hold accounts open until the last day of class. This will avoid writing several receipts for the same person as well as giving them the opportunity to buy more.

HELPFUL POINTERS FOR DISPLAY

- Display Area should be by the door and near the food station.
- The display tables should consist of no less than (5) 6' X 30" tables, preferably more. Use the empty crates, covered with tablecloths on top of display tables to create a more attractive display as well as extra space.

ARRANGING EDUCATIONAL MATERIAL

1. Have a center point on your display for a section of materials that directly correspond to the courses being held.

CRANIOSACRAL THERAPY SECTION

- a. CranioSacral Therapy I,
- b. CranioSacral Therapy II, Beyond the Dura
- c. SomatoEmotional Release and Beyond
- d. Your Inner Physician and You
- e. Brain is Born
- f. Introduction to CranioSacral Therapy
- g. The Endless Web
- h. CST Touchstone for Natural Healing
- i. Cell Talk
- j. Classroom and studio video series
- k. Intercranial membrane slide series
- l. Plastic Skulls/Membranes
- m. Still Point Inducers

ANATOMY & NEUROMUSCULAR SECTION

- a. Myofascial Pain and Dysfunction Volumes I and II
- b. Clemente's Anatomy
- c. Netter's Atlas of Human Anatomy
- d. Netter's Neuroscience Human Atlas
- e. CD- CranioSacral Therapy I Dissection Images
- d. Skulls
- e. Bag of Bones
- f. Any other books on anatomy

2. Next build books on both sides of center point with your best sellers.

- a. Atlas of Manipulative Techniques
- b. Muscle Testing and Function
- c. Massage Therapists Guide to Pathology
- d. Musculoskeletal Disorders
- e. Insurance Reimbursement & Specialty Physicians Reference
- f. Positional Release Therapy
- g. Somatic Technique
- h.

3. Try to have book stands to display popular and expensive books. People tend to choose these first. Table tent signs with prices for air mats, videos, skulls and other items are located in your facilitator pack. Hand written signs for other recommended items could also be written and added to your display.

4. If your table is busy, make notes of what the participant needs and write a clear and accurate receipt once class continues. Use post-it notes to write names of participants and place the post-it on the stack of products that they give you.

Each product falls into a specific price schedule that relates to the quantity discounts that can be used. Your product price list gives the discount code. Please use the grid below to determine quantity discount percentages. Remember there are NO double discounts, so teaching assistants can use whichever discount is greater, but not both.

QUANTITY DISCOUNTS

Product Discount Code	Quantity 1 – 4	Quantity 5 - 9	Quantity 10 - 24	Quantity 25 +
A	0	25%	40%	50%
B	0	20%	30%	40%
C	0	15%	25%	35%
D	0	10%	20%	30%
E	0	10%	15%	20%
F	0	0	0	0
G	0	0	0	0
H	0	0	0	0
Z	0	0	0	0

POINTERS FOR HIGHER SALES

SALES ARE HIGHER WHEN YOU HAVE AN INFORMED CONSUMER!

1. Product recommendations from the instructor can create a lot of interest and higher sales of a particular item. Ask the instructors which items they promote or highly recommend and make them a focal point on your display table. Signs indicating the instructor's recommendations and prices of the products can save you a lot of time answering questions and increase sales.
2. The facilitator should be familiar with all recommended educational materials. Take time during the class to read and discover these recommended books. It will enrich your knowledge and enhance your selling ability. Also, introduce the instructors to any new items so they may review them.
3. Make sure the display table is open and ready to go early each day.
4. The facilitator will increase sales if they circulate and get to know each participant during the workshop. Try memorizing participant's names and use their name when greeting them.
5. Show DVD's during their lunch hour and breaks if possible. Try to have the participants bring their lunch so they can stay and watch the video.
6. Ask the instructor to mention that air mats are available for sale. Reasons to purchase an air mat are:
 - a. They are very easy to transport
 - b. They are easy to inflate and deflate.
 - c. The cost is \$30.00 for the ones used during the workshop (reg. \$35.00).
 - d. They are very difficult to find in most stores.
 - e. They are great to use when first learning CST.

Don't make any participant wait long. You can start piles for participants waiting to purchase books and write up accurate receipts later. Make eye contact with a participant and let them know you will be with them in a moment. Don't ignore anyone! Always be professional, courteous and gentle with participants.

SMILE ☺

SET UP – DAY BEFORE

Blow up Mats (if applicable)
Set out Registration Materials
Set up Book Table
Catering Meeting
Review All Notes in Facilitator Packet

SAMPLE DAY ONE TIME GRID

TIMES	
7:30	Check catering and room(s) right before set up
8:00	Registration & Continental Breakfast
9:00	Seminar begins, introductions
9:30	Registration close
10:30	Participant break
10:45	Call home office
12:00	Participant lunch break - Display Table fully set-up, Sales
1:00	Seminar resumes
3:00	Participant break
5:00	Seminar ends — make sales — lock up

Typical Day One, Morning

Announcements

Introduce Self

Location of restrooms

Name in Study Guide — ask students to write their name in Study Guide

Temperature concerns — suggest participants bring clothes for both cool and warm temperatures as it may take time for the room to warm up or cool down.

Set up book bags — explain procedures and inform them they may still purchase an item if it is sold out without additional shipping costs.

Remember:

Times may change and cannot always be predicted.

Be available until each day ends.

Eyes and Ears for UI.

DAY TWO TIME GRID

TIMES	
8:00	Open Table, check catering, check room(s) - make sales
9:00	Seminar begins
9:15	Hang display cards
10:30	Participant break - make sales
12:00/1:00	Participant lunch break - make sales
1:00/2:00	Seminar resumes
3:00/4:00	Participant break - make sales
4:55	CSI - CV4 and Membrane*
5:00	Seminar ends, sales, pick up nametags, lock up

* Membrane models may also be handed out during lunch for CSI, please check with instructor.

DAY THREE TIME GRID

TIMES	3 Day Class	4 Day (or more) Class
7:45		Check slide projector (CSI)
8:00	Open table Check catering Check room(s) Seminar begins	Open table, Check catering, Check room(s) HAND OUTS: CSII-Discover Brochure, \$200 Registration coupon, CSI-cartoon
9:00		Seminar begins
10:30	Participant break	Participant break – make sales
12:00/1:00	Participant lunch – make sales 3 day classes: Final Day Announcements	Participant lunch CSI: Show 10 Step video
1:00/2:00	3 day classes: hand out evaluations	Seminar resumes
3:00/3:30	Participant break,	Participant break – make sales ANNOUNCEMENT: Explain the \$100 off coupon and (if applicable) Discover Brochure
5:00	Seminar ends Encourage Closing Out	Seminar ends, make sales, pick up nametags, lock up

DAY FOUR (OR LAST DAY) TIME GRID

TIME	
7:15	Check room(s), Check catering, Hand out Evals (check with Instructor)
7:30	Display table opens
8:00	Seminar begins
8:05	ANNOUNCEMENTS: Display table will close after morning break, sales or registration incentives, evaluations filled out and turned in, pick up certificates, CEU letter and class roster will be mailed to participants in approximately 2-3 weeks.
9:30	Participant break – final sales and registrations
9:45	Seminar resumes, Pack up Book Table
12:00	Participant lunch break
1:30	Seminar resumes.
3:30	<p>Seminar ends.</p> <p>ANNOUNCEMENTS: let the air out of air mats. (Instructor may make this announcement for you)</p> <p>Answer final questions, complete all transactions, last minute registrations, and collect remaining evaluations.</p> <p>Pack air mats.</p> <p>Complete packet and send or carry to home office.</p>

MONEY BACK GUARANTEE

If a participant is unhappy with the seminar and wants their money back, have the participant write a letter stating the reason for not finding value in the course and have them return their study guide to you. Return the refund request and the study guide to the home office to be processed there. **NO REFUND WILL BE GIVEN AT THE SEMINAR LOCATION.** We offer this because we are very confident about the quality of the seminars, the material being presented and our instructors. Products may be returned within 7 days of purchase. These products must be in saleable condition and accompanied by the original packing slip or receipt.

FUTURE SEMINAR REGISTRATIONS

HOW TO INCREASE REGISTRATIONS

Get participants interested in taking the next level courses. Tell them about other participant's feedback after taking these courses and how they are using it in their own practices. You may want to even share a bit of your own personal experiences receiving the work. Participant evaluations are a valuable source of information in learning how participants respond to other types of seminars and instructors you may not be personally familiar.

Ask the teaching assistants and instructor(s) to give a brief description of their workshop experiences.

Help participants plan their class schedule for several upper level courses. See what courses they need to take and what is accessible to them. Leave enough time between courses for practice and required reading. Example:

CSI - Dallas - March
CSII- Dallas – August
SER - Austin - January
SERII – Houston - April

Highlight courses in their area on date seminar display sheets.

Post a large sign on the door of the classrooms with upcoming courses in their area.

This is a good time to use the printout of participant information. This report is a printout of the participant's future class enrollment. Please use this form when you are talking to participants about future seminar registrations. Compare the classes they need to attend to complete a series to the cover sheets and explain the classes next in line. Point out when they are coming to the area. Indicate any discounts. Encourage them to sign up for classes that are close to filling.

THINGS TO REMEMBER WHEN TAKING A REGISTRATION

1. Collect at least 50% of workshop tuition (typically \$300). If the seminar is less than 30 days away, the full amount should be collected. A 50% minimum deposit is also required if the participant wishes to be put on a waitlist for a class that is currently full.
2. Payment plans are also accepted by auto charge or through billing (we prefer charging monthly payments to their credit card). Balances should be collected one month prior to the course. Encourage participants to set up auto charges for the balances of their registrations and write these on the receipts so they can be put into the computer. If expiration date on card is after last payment date, they will need to contact us when card is renewed.

3. Pending registrations are also available if they absolutely cannot make a payment toward the class. However, remind them that any upper level discount is only applicable if they put money down AT the seminar. Make sure participants give estimated dates for payment of the deposit. Let them know their place is not confirmed until the deposit is received. TA vouchers do not count as deposit.

COMPLETING A REGISTRATION RECEIPT

1. Fill in Starting Date of Seminar and City Code
2. Fill in the participant's full name and date.
3. Write deposit and class title, location and date. If the class is full, write the date and time they registered for the waiting list. DO NOT tell them what number they are on the waiting list. Since the office is taking registrations, the number may be different from what you have and what their actual number on the waiting list will be.
4. Write the amount of the deposit at the bottom in the sales total section.
5. Credit card receipts must be signed. Make sure the credit card has not expired.
6. Place a "P" on the upper left hand corner of checks for products and "S" on the upper left hand corner of checks for seminars. If using a check for both write amount for each (i.e. P-\$86.50 S-\$300)

SEMINAR SHIP ITEMS POLICY

Before we will waive shipping charges for any reason, a person has to spend a minimum of \$50 on products.

For ALL ship items from a seminar in Canada, Alaska or Hawaii, we charge the standard continental U.S. rate of \$8.50 for the first item, \$1.75 for each additional.

1. Items that were not in a seminar inventory are not shipped for free. Example - we do not send Discover Zero Balancing Brochures to a CranioSacral Therapy I class. Someone ordering them there would be required to pay shipping.
2. If we run out of an item at a seminar in the continental U.S., we offer free shipping if the person is spending \$75 or more. Items will be sent via US Mail (book rate) and not FedEx Ground. So delivery may be delayed.
3. If there is an item that is on back order that is regularly sent to a class, the shipping is free if the person is spending \$75 or more. Example - Your Inner Physician and You Books are on back order and someone wants to order them at a seminar, no shipping charges.
4. If there is an item that is available at a seminar but the person prefers to have it shipped rather than carry it home, they MUST pay the shipping charges. Example - someone wants to purchase 10 IPAY's but only wants to carry two of them in his/her suitcase and wants the other eight shipped. He/she must pay the standard shipping charges for the eight. (Unless we run Out)

REGISTRATION FORMS, CODES & PRICE SHEET

Cost varies by location.

CLASS	CURRIC	TUITION	PREREQUISITE	LENGTH
SC	CS	Cost varies by location. \$15.00 for family members of UI employees. \$50.00 off CSI when registering at this class.	None	1 day
CSI	CS	\$795.00 \$200 – 60 day early Registration \$100 – 30 day early Registration \$350.00 for full time qualified students. \$795.00 + 5% tax if held in New Mexico. \$750.00 US + 5% GST if held in Canada. (13% GST in Halifax.NS) \$200.00 discount if registered and paid at least 30 days before class begins. \$450.00 US + 10% GST if held in Australia. \$400.00 US if held in New Zealand. \$50.00 discount if registered and paid at least 30 days before class begins.	Healthcare Read Chapters 1-6 in <u>CranioSacral Therapy and Your Inner Physician and You.</u>	4 days Contact Hours: 24
CSII	CS	\$795.00 \$795.00 + 5% tax if held in New Mexico. \$750.00 US + 5% GST if held in Canada. (13% GST in Halifax.NS) \$200.00 discount if registered and paid before end CSI \$450.00 US + 10% GST if held in Australia. \$400.00 US if held in New Zealand. \$50.00 discount if registered and paid at least 30 days before class begins.	CSI Read Chapters 7-15 in <u>CranioSacral Therapy and Chapter 3 in CranioSacral Therapy II, Beyond the Dura.</u>	4 days Contact Hours: 24
SERI	CS	\$795.00 \$795.00 + 5% tax if held in New Mexico. \$750.00 US + 5% GST if held in Canada. (13% GST in Halifax.NS) \$200.00 discount if registered and deposit paid before end of CSII. \$450.00 US + 10 % GST if held in Australia. \$400.00 US if held in New Zealand. \$50.00 discount if registered and deposit paid before end of CSII.	CSII Read <u>Getting to Yes & SER & Beyond</u>	4 days Contact Hours: 24.
SERII	CS	\$795.00 \$795.00 + 5% tax if held in New Mexico. \$750.00 US+ 5% GST if held in Canada. (13% GST in Halifax.NS)- \$100.00 discount if registered and deposit paid before end of SERI. \$450.00 US +10% GST if held in Australia. \$400.00 US if held in New Zealand. \$50.00 discount if registered and deposit paid before end of SERI.	SERI Read <u>Getting to Yes, SER & Beyond, The Selfish Gene, The Art of Effortless Living</u>	4 days Contact Hours: 24
ADV	CS	\$1250.00 Instructor: Other than Dr. Upledger \$500.00 deposit and application required	SERII	5 days Contact Hours: 30
ADVII	CS	\$1500.00 (\$500.00 deposit and application required)	ADV	5 days Contact Hours: 30
SYM	CS	Varies	None-Can only ask questions after CSI	1-2 days

DISCOUNTS

TA VOUCHERS

IAHP vouchers can be applied toward UI & IAHE courses (CS, HFC, LDT, BTB, VM). TA vouchers can be used toward only CS, HFC, and LDT courses. TA vouchers CANNOT be used toward PA, ZB, HCT, EI, FMC, or NMT seminars. Call UI to verify any other case.

STUDENT DISCOUNT (\$350 plus any applicable taxes and city surcharges)

Students in a health care program of at least 500 hours for massage therapy or full time in a PT, OT, RN, or DC program receive a discount on level 1 courses. They are: CSI, LDT1, and HFCC. They must pay a \$175.00 deposit on the class while they are still a full time student and provide verification of their student status. This verification can be either a copy of a current student ID or a letter on the school's letterhead stating that they are enrolled, how many hours the program is and when they are expected to graduate. They don't have to take the class while still a student, just register for one (or more). Students in Texas enrolled in a 300-hour health care program qualify for student discounts.

PRODUCT DISCOUNTS

Up to 25% on applicable product: Instructors, Staff Teaching Assistants, Certified Teaching Assistants, Facilitators and UI staff

Up to 15% on applicable product: Teaching Assistants only while they are assisting or when using their TA 15% coupon.

Quantity discounts are available on most items when purchasing at least 5 or more. (See Discount schedule of products for percentage discounts on quantities of 5 or more) REMEMBER-- DO NOT DOUBLE DISCOUNT.

Though the majority of products are eligible for the 15 and 25% off, some exceptions may apply. For verification please check book/product list. These are columns that give the applicable price per discount.

ANNOUNCEMENTS AND HANDOUTS

The following are typical announcements for CS courses. **Modify if necessary for the class you are facilitating (the time-grids will be helpful).** You may not be able to make all of the announcements. Take into consideration the group dynamics, class flow and how the instructor feels about them. Inform participants as much as possible without being pushy.

FACILITATOR INTRODUCTION/ANNOUNCEMENTS

Sample script:

“My name is _____ and I'm working with _____ and we're from the Upledger Institute. We will be here to answer any questions you have from all of the Educational Materials on display that were recommended and reviewed by Upledger, Teachers and Staff as well as all the course curriculums and continuing your path on this curriculum. Also as a network system to help continue your path.”

Logistics: Other courses (at the time going on)

Message area
Hotel Restaurant
Bathrooms

1st Day Morning:

- 1) Breakfast was for the first morning only, but there will be coffee and teak the rest of the days in the mornings only.
- 2) Wear Name Tags
- 3) Drop Name Tags off in Bag -
Pick up in AM-
If you have License/Cert # please add to sheet by Name in AM.
- 4) Any Demos going on during the weekend
- 5) Announce - Sat lunch hour video

Day 3 - CEU Credits in mail with letter of attendance and roster and \$100 pre reg discount -

May be done in the afternoon after 10-Step DVD
Courses in areas
Transfer/Cancel Policy
Preparation/Study Aids - (Only texts & Videos)
Starter Kit – Text book for next class
Check out this afternoon or before class on Sunday

Day 4 - Evals

Air mats (Don't forget to take if you have purchased or want to purchase)
Study groups on internet or if approved groups have a flyer out.
Remember to take Certificates with you!

DAY 1

INSTRUCTOR INTRODUCTION

- Instructor should welcome the participants and introduce him or herself, followed by a brief educational and professional background as well as mentioning how they became affiliated with The Upledger Institute.
- **UPPPPOR** should be discussed. A sample follows for CranioSacral Therapy. Appropriate modalities should be substituted anywhere CranioSacral Therapy or its techniques are mentioned.

- U Utility:** CranioSacral Therapy provides a new set of tools for participants to integrate into their professions that will benefit their clients by allowing them to achieve significantly better results.
- P Product:** The goal of this workshop is to sharpen students' palpation skills and teach them a 10-Step Protocol evaluation and treatment they can begin using immediately.
- P Process:** Our methods of instruction include lectures, demonstrations and "hands-on" practice. A brief outline should be given of what the course will cover each day, including class hours and breaks. Time should be allowed for questions.
- P Process Justification:** Allowing participants to learn "hands-on" with the instructor and assistants builds confidence in their abilities.
- P Proof of Ability:** The instructor should build the participants' confidence by assuring them that this is a learning environment and they are free to ask questions throughout the course. The "hands-on" learning technique has proven successful for many years.
- O Objective:** The instructor needs to state specific objectives for the workshop, such as being able to feel the CranioSacral Rhythm over several parts of the body and feel the bones of the skull move, as well as perform the complete 10-Step Protocol.
- R Review:** Recap the workshop content using the format above.

- Instructor has participants introduce themselves and then has the staff do the same.

ANNOUNCEMENTS

- This may also be a good time to point out where the rest rooms are, public telephones, and any local restaurants that might be of interest.
- If there are any participants in the class looking for a roommate at the lodging site, it is a good opportunity to announce this as well.
- Temperature, bring clothes to layer for warmth – cooling.
- Put name in study guide.
- Continental breakfast today, beverages rest of the mornings.
- Talk about putting name on last copy of a certain product, leaving it in the table until checking out.

Tell participants about the bag technique as they come up to you at the first break. Others will hear and see what you are doing, and catch on. Announcing this on the first day may seem too pushy.

Announce:

Post a sign for the lunch break asking for a volunteer to bring in a TV and VCR. Make a note that they will receive a free 10 Step Protocol video which is worth \$60.00. Videos can be watched each day before class or at lunch. The 10-step video will be played for everyone on the 3rd day at lunchtime.

End of Class:

- Make sure the participants hand in their nametags (announce this everyday)
- Wish them a good evening (with a smile!)

DAY TWO:

Before workshop begins:

CS and LDT Classes--	Make a sign about audio/chart/video packages available
CS Classes--	Make a poster about video packages and discounts available

- The full set will help them prepare for CSII.
- European PAL System videos and discounts are available.
- Place the table tents that explain these discounts near the videos
- You may feel more comfortable making a sign and posting the information near your display table.
- Additional discounts are available for IAHP medallion members-explain.

Before or after lunch:

- Now is a great time to let the participants know what materials are the instructors' favorites. **Make a sign of books the instructor has found useful and post it on the classroom door.** Or make a special section on your display table of instructor favorite items. The instructor's list is on the pick lists, so make sure you have enough of them at the seminar and promote them to the participants. Each instructor has his or her favorites for each class.
- The instructor will recommend quite an array of books during the V-Spread lecture on day two of the CSI class. Display these books where the participants can easily see them. Remember to check with the instructor before lecture to see which ones they prefer to promote. The following is a list of books most instructors discuss at a CSI class.
 - Body Electric
 - Cross Currents
 - In Search of Schrodinger's Cat
 - Therapeutic Touch
 - Inner Bridges
- Collect name tags.

DAY THREE OR FOUR:

Future Workshops

- Have instructor discuss continuation of workshops. It is important to stress that most courses are in extreme demand and space is limited. Be brief. Ask the teaching assistants and instructor(s) to give a brief description of their workshop experiences over the duration of the workshop.

HANDOUT- Place a “future workshop coupon” on the tables first thing in the morning. This informs them they will receive \$100 off the next level workshop if they register and make a deposit of at least \$250 (\$225 in Canada) before the workshop ends. List which classes the coupon applies to.

Explain that they can be put in a “holding class” if they do not know what location and date they can attend. Also, they may submit a written request and receive a full refund, more than 30 days prior to the requested seminar, so there is no risk in registering.

- On day three of CSI the instructor will lecture on the cranial membrane system. This is a perfect time for promoting skulls. The membrane models when put together fit nicely inside the skull showing how the membranes attach to the skull bones. This is helpful in explaining the work to patients and other therapists.
- Air mats for purchase (announce current price).
- Collect nametags.

DAY FOUR:

Morning:

- Hand out evaluations.
- HANDOUT- Discover brochure. On the morning of the last day put a sample of the discover brochure at each one of the participant’s place that corresponds to the class they are taking. You can do this for the following classes: CSI, CSII, CSP, LDT1, and LDT2. This may be the first time level one participants have seen the brochure and for upper level participant, it is a good reminder they are available.
- Announce that due to liability reasons The Upledger Institute cannot give referrals. However, there are two ways to find information on practitioners in other areas. They can go to www.upledger.com or purchase our IAHP directory. Both are excellent tools for networking and referring clients. Let them know you have brochures describing the benefits IAHP Medallion members receive, and as for as little as \$25 a year, they receive medallion benefits including a listing on the website.
- When applicable, remind them today is the last day to receive the upper level discount on the next class in the curriculum. Explain that space is often limited and courses are many times waitlisted. A 50% deposit is required to hold their spot in the class or even on the waiting list.
- Handout – CPT code information (CSI classes only)

Before lunch or at the end of the seminar:

- When applicable, discuss the importance of certification and what is required.
- Let participants know what a pleasure it has been to meet them and be there with them during the workshop.
- Recommend that any CST clinical questions be written, faxed, e-mailed or phoned in directly to the clinic and a therapist on staff will respond as soon as they are available. The email address is

Upledger@upledger.com, phone number is 561-622-4706 and fax number for the clinic is 561-627-9231.

- Remind them the evaluations (that you will be handing out – or already have handed out) and the feedback they provide are a very important to The Upledger Institute. Ask them to take the time to fill the evaluation out completely and hand them in before they leave. It is our way of improving our courses. We want to please the participants and it is by their recommendations that we are able to do so.
- Announce that a final roster with the participants, teaching assistants and instructors' names, addresses and phone numbers, along with a CEU letter of attendance and a course schedule will be mailed in approximately two weeks.

CLOSING / OVERNIGHT PACKAGE

Your Federal Express package will contain the monies (checks and a money order or your personal check for the cash received), receipts, reports, etc. from the workshop. Send this following the close of the workshop for overnight delivery. If you send FedEx, keep your receipt with the package number.

Include the class, date and city on the weigh bill in the section entitled Internal Billing Reference.

CLOSING PACKAGE SHOULD CONSIST OF:

1. FACILITATOR REPORT

- This report will be the overall summary of what happened at the workshop.
- Note: The comment section of this report should include information not included on the Facilitator/Workshop Evaluation Form.
- Seminar Monies are reported on this form. This report reconciles your total collected monies to total receipts. It also reflects per person product and registration percentage as well as total per person average.
- Please check your monies on a daily basis. Add your receipts for each day. They should equal total funds collected for the day, (MC/Visa, Amex, Cash, Checks, etc.) Similarly at the end of the workshop, total receipts should equal total monies.

2. MEETING SITE EVALUATION FORM

- It is extremely important to know if there were problems or things went smoothly. It helps us make the decision whether we should use the meeting site again. If anything unusual occurs (theft of items, accidents) please get a copy of the "incident report" and return in your final workshop package.
- If you feel the service provided was excellent and you would like to use the facility again, please write a brief Thank You note to the management. This gesture may go far in cementing good relations with the facility.
- While you are at the meeting site, please take time to ask about the area's seasonal business fluctuation. We like to schedule meetings during off peak times if possible (please use the space on your workshop evaluation form to report this information to us). If possible, let our contact know of future dates on our schedule and tentatively hold space if it is available. Make meeting planning aware of this so they can follow up.

3. FACILITATOR'S INSTRUCTOR/TEACHING ASSISTANT EVALUATION

- Instructor: Did they follow Course Outline and U.P.P.P.O.R.? - Remember you are the eyes & ears for The Upledger Institute.
- Teaching Assistants: We want our teaching assistants to be the best. It is very important our teaching assistants are committed to the entire workshop. Discuss any problems with the instructor and address any problems immediately at the seminar. Please note any problems you feel need to be addressed by the TA coordinator.

4. PARTICIPANT ACTIVITY LOG:

- This report includes all changes made to classes a participant was already registered for, any new prospects, etc. Include a complete explanation of the transaction. If a participant or staff member recommends adding a book to our reading list, please include the participant's name as well as the book title, author and publisher.
- Certificates of Attendance have been preprinted. If any corrections need to be made, a new certificate needs to be requested. Please note these requests on the participant activity log.

5. TEACHING ASSISTANT AND INSTRUCTOR EVALUATIONS

- All facilitators will receive Participant Evaluations in their registration packet. Please disperse one to each teaching assistant and Instructor. They are to evaluate participants throughout the workshop. We are looking for strengths or weaknesses participants may have. Please note if they would make a good future teaching assistant. Please remember we appreciate each teaching assistant filling out a workshop evaluation. Make sure they cross out any participant who did not attend.

6. WORKSHOP EVALUATIONS

- Please update these evaluations before handing them out to the participants (i.e.; add or delete TA's, facilitators etc.). Tally the scores for all staff as well as applicable responses and enter the results on the blank form in your packet. Attach Tally Sheet to Evals and include in packet.

7. PUBLICATION SEMINAR REPORT

- Please attach hard copies of the educational material receipts to this report.

8. INVENTORY SHEET

- A Final Inventory Sheet must be completed for items and boxes remaining at the close of a seminar. It is extremely important to count your beginning and ending inventory, mark the exact inventory in each box and note the number of boxes shipped. Make sure this is accurate. You are responsible to fill in all columns and report any discrepancies.
- Return the copy of the return inventory sheet. The extra skinny tracking number labels should be attached to the back of the returning inventory sheet. It should show the number of boxes being returned, the approximate weight of the total boxes and the beginning and ending tracking numbers of the boxes. (Hint: an average box weighs 40 pounds).

9. SEMINAR \$\$ REPORT

- Attach hard copies of all receipts pertaining to balances being paid, deposits being made for future workshops or Foundation money collected.

10. SIGN-IN SHEET

- This is the original roster used for registration. Each participant should have signed and made corrections if needed. If a participant didn't show up, write no-show on the sign in sheet. If the participant attends, but doesn't sign, write "here". No names on the sign in sheet should be left blank. The office will make the corrections in the computer to ensure a correct roster is sent to participants.

11. SALES RECEIPTS

- Complete date (including year) and workshop city.
- Write participant's name legibly on each receipt.
- Fill in address and phone number when order is to be shipped to address other than the one on the sign-in sheet.
- Complete payment information.
- Abbreviate book titles using the computer codes listed on the price sheet and write as much of the title of the item as possible for the benefit of the participant. (i.e. BE – Body Electric or DSTSP – 10 Step DVA)
- List each item sold then subtotal. If discounts apply, note what type (i.e., instructor, teaching assistant, etc). Show the amount of discounts as (-) or (<) or (>) so that they see how much they have saved.
- Mark the quantity of items in the "take" column whenever a participant takes the item, "ship" for shipped items and "table" (TB) for any items of theirs on the table. If you sell your last item to a participant ask them if you can display it on the table with their name attached until the end of the seminar. Writing TB on the receipt will remind you when checking them out that it is not in the bag and needs to be taken off of the table and given to them.
- Be sure to mark the payment method. If it is by check make note of the check number and the name on the check. If it is cash make sure to place an (X) or (check mark) in the cash spot.
- Participants are allowed to pay with a credit card on file with us ONLY if they do not have the card in their possession and they are sure we have a current card on file. (But ALWAYS try to get an imprint). Write "Visa (or Amex, etc.) On File" at the top of the receipt in these instances. Make sure participants use credit cards that haven't expired. Get a signature on credit card receipts.
- Make sure that applicable taxes are being collected that it is clearly marked and correctly calculated. Taxes should be calculated **after** discounts are applied.
- Always check and re-check your calculations. It is very easy to make a mistake.
- A receipt is filled out for each sale or item taken (whether it is a cash, check or credit card).
- The sales receipt form is to have each item listed. Do Not Skip Lines
- Mark "P" for products or "S" for seminars on upper left corner of checks.

Two-part NCR receipts:

Top (white) copy: Give to customer

Bottom (hard) copy: Keep for UI records
Balance attach to quarter page Seminar Report
Payment attach to quarter page Seminar Report
Registration attach to quarter page Seminar Report
Product Sale attach to quarter page Publication Report

Hand carry the hard copies of the receipts, checks and cash back WITH YOU. DO NOT check these in your luggage! Luggage can be lost or stolen and you are responsible for any money that has been lost or stolen!

All items not returned to UI must be paid for by the end of the seminar.

12. FINAL FINANCIAL REPORT

Total Sales

Sales -Total = All product sold after discounts
Sales Tax = % of sales total
Shipping = any shipping collected
Balances = Tuition for current class
Payments = Tuition for future classes already registered for
Sign-Ups = Tuition collected for new registrations (including any seminar tax)

Total Money Enclosed

Visa/MC/Disc = All Visa, MasterCard, and Discover monies
(Card numbers begin with 4, 5, and 6 respectively)
Amex = All American Express monies (card number begins with 3)
Checks = Total of all checks and money orders
Facilitator Check = Personal check to UI by facilitator in lieu of giving/
mailing cash
Traveler's Checks = Traveler's checks received (remember if you gave change to customer

then

Deduct this from cash amount due to UI)
Cash-Sales = Cash collected for product sales (less change for any travelers checks plus
Tip to Banquets staff – max allowed \$20 per class)
Cash-Seminars = Cash collected for seminar sales
Other = Credit on file, gift certificates, etc.

Financial Figures

Sales PPA = Total sales divided by the number of participants
Sign-Up PPA = Sign-ups divided by the number of participants
Total PPA = Sales PPA + Sign-up PPA
Sign-Up PPA% = # of registrations divided by number of participants
% Next = % of registrations into the next level of the curriculum, divided by the
number of participants.

13. OTHER

Teaching Assistant Recommendation

This is to be completed by participants who would like to assist in the future or would like to assist at a more advanced level course. The assistant eligibility guidelines are printed on flyers located in your A-Z.

CSII Petition

The schedule is limited in CranioSacral Therapy II Workshops. We would be willing to add a CranioSacral Therapy II to the schedule in most cases, if we had approximately 25-30 confirmed participants (confirmation means the participant has placed a deposit on the course). Feel free to involve participants in adding a class in their area and inform them of our participant requirement. This often will encourage them to get involved and encourage other participants to register. Please do not give them dates at the seminar unless you have spoken to the home office first! This could lead to participant's disappointment if the class is not scheduled as soon as they would like.

CANADIAN CLASSES

- You must bring a passport to enter Canada.
- Your workshop package and facilitator kit will be sent via Federal Express to your meeting site for you.
- Check that you are visiting Canada for business on your customs form. Bring the work permit letter or worker's permit that you already obtained. You will need to pay approximately \$150 CAN for a work permit. Please use a credit card and submit a check request for reimbursement when you receive your CC statement showing the US amount charged.
- Upledger classes conducted in Canada are almost always \$45 (U.S. dollars) less than when held in the US. (CSII \$750, \$650 with pre-reg discount.) We do this because the exchange rate for Canadians affects the tuition. 5% GST must be added to course fee. (Halifax 13%)
- All prices are in US dollars. A 5% GST tax must be obtained on all items sold. (Halifax 13%)
- Accept only U.S. dollars for items purchased. Using a credit card may be easiest for participants, make sure to indicate US funds on the receipt.
- (If we run out of an item the shipping is not waived as it is for US classes, but we offer the following lower domestic rates.) Shipping is \$8.50 US for the first item and \$1.75 US for each additional item. These prices will apply to most items purchased at a Canadian workshop that need to be shipped to within Canada.
- Unless told differently, boxes are to be returned to The Upledger Institute by Fed Ex-International. Preprinted labels will be sent to you and will be included in your hundredweight pack. Mark on each box the general contents (videos, books, facilitator kit, etc.) Make an accurate inventory records of returned items.
- Whenever possible, bring your package back to UI or if necessary send your seminar package to the home office via Federal Express.

CERTIFICATION

CRANIOSACRAL THERAPY

For qualified individuals who wish to be certified in CranioSacral Therapy taught by The Upledger Institute. Let them know you have brochures available outlining the program.

Therapists certified by The Upledger Institute will receive recognition for their CranioSacral Therapy knowledge and skill by our institute as well as show their support for the practice of the therapy as a profession.

There are two levels of Certification:

CranioSacral Therapy Techniques (available after CSII)

CranioSacral Therapy Diplomate (available after ADV)

BENEFITS OF CERTIFICATION

1. Help build case for national and local governmental recognition
2. Help build case for insurance recognition
3. Upon governmental recognition, UI will seek "grandfather" status for UI certified therapists
4. Listed as certified in IAHP directory
5. Use UI logo on advertising and business cards

INTERNATIONAL ASSOCIATION OF HEALTHCARE PRACTITIONERS (IAHP)

The Upledger Institute has joined with other healthcare groups to form the International Association of Healthcare Practitioners (IAHP). The IAHP was established to offer therapists a new forum from which to network issues in their field of healthcare. It will link the many disciplines of holistic healthcare into a cohesive unit of similarly minded professionals. Let anyone who may be interested in more information know you have brochures available.

COURSE REQUIREMENTS

CRANIOSACRAL THERAPY I

AV / ROOM REQUIREMENTS

Microphone for large class (instructor should provide microphone, get cord to plug into wall from hotel)
Slide projector, screen - Morning, DAY 3
Air mats - 1 for every 2 participants
One 6' x 30" table for every 2 participants + chairs
Extra stacked chairs
Tables and chairs in back for Teaching Assistants
See instructor requirements for white boards and flip chart, power strips, etc.

HANDOUTS

Study Guide - Registration
CV4/Tennis Ball Technique - DAY 2
Membrane Models - DAY 2
Cartoons - DAY 3
Discover brochures – DAY 3
CSII Coupons - DAY 3
Evaluations - DAY 4 and CPT Code
Certificates - DAY 4

REQUIRED READING

CranioSacral Therapy - chapters 1-6
Your Inner Physician and You

RECOMMENDED READING/VIDEOS

Body Electric
Endless Web
10-Step Protocol Video

DISCOUNTS (Prices for most US classes)

Participants receive \$200.00 off CSII with \$300.00 deposit before completion of CSI
Student tuition \$350.00
Repeat tuition \$300.00 if registered outside 60 days, \$400.00 if registered within 30 days of class
Certification Applicants (having paid for this) can repeat CSI for \$100.00

CRANIOSACRAL THERAPY II

AV / ROOM REQUIREMENTS

Microphone for large class (instructor should provide microphone)
Air mats - 1 for every 2 participants
Rubber Gloves
Finger Cots
Sanitation Bag for used cots and gloves (send these back to UI in the bag)
Kleenex
Sphenoid/Occiput Model
One 6' x 30" table for every 2 participants + TA's
See instructor requirements
Extra stacked chairs
Tables and chairs in back for Teaching Assistants

HANDOUTS

Study Guides - Registration
SERI Coupons - DAY 3
Evaluations - DAY 4
Certificates - DAY 4
Discover brochures – DAY 3

REQUIRED READING

CranioSacral Therapy, chapters 7-15
CranioSacral Therapy II Beyond the Dura, chapter 3

RECOMMENDED VIDEOS/MATERIALS

Patient Treatment Sequence Video
Avenue of Expression Video
Hard Palate Video
Voice of the Body Video
Full Body Diagnosis Video
CranioSacral Therapy for Infants Video
Bag O' Bones

DISCOUNTS (Prices for most US classes)

Participants receive \$100.00 off SERI with \$250 deposit before completion of CSII
Repeat tuition \$400.00 (US)
CST Certification Applicants can repeat for \$100

SOMATOEMOTIONAL RELEASE I

AV / ROOM REQUIREMENTS

Air mats - 1 for every 3 participants
Microphone for large class (instructor should provide microphone)
Gloves
Finger Cots
Sanitation Bag for used cots and gloves (send back to UI in this bag)
Kleenex
One 6' x 30" Table for every 3 participants + TA's
See instructor requirements
Extra stacked chairs
Tables and chairs in back for Teaching Assistants

HANDOUTS

Study Guides - Registration
SERII \$100.00 discount coupons – Day 3
Evaluations - Day 4
Certificates - Day 4

REQUIRED READING

SomatoEmotional Release text
Getting to Yes

RECOMMENDED READING/VIDEOS/MATERIAL

Language in Thought and Action
Triumph of the Embryo
Video- Energy Cysts and SomatoEmotional Release with Therapeutic Imagery and Dialogue
Video- Energy Cysts - Part I
SomatoEmotional Release - Part II

DISCOUNTS (Prices for most US classes)

Participants receive \$100.00 off SERII with \$250.00 deposit if registered before completing SERI
Repeat tuition \$400.00

SOMATOEMOTIONAL RELEASE II

AV / ROOM REQUIREMENTS

Air mats - 1 for every 3 participants
Microphone for large class (instructor should provide microphone)
Gloves
Finger Cots
Sanitation Bags for used gloves and cots (send back to UI in this)
Kleenex
Polaroid/Film
Crayons
One 6' x 30" table for every 3 participants + TA's
See instructor requirements
Extra stacked chairs
Tables and chairs in back for Teaching Assistants

HANDOUTS

Study Guide - Registration
Certificates - DAY 4
Evaluations - DAY 4

REQUIRED READING

SomatoEmotional Release
Getting to Yes

RECOMMENDED READING/VIDEOS/MATERIAL

Language in Thought and Action
Triumph of the Embryo
Video- Energy Cysts and SomatoEmotional Release with Therapeutic Imagery and Dialogue
Video- Energy Cysts - Part I
SomatoEmotional Release - Part II
A Brain is Born Video
The Selfish Gene

OTHER

Days 2-4 begin with the chairs in a circle at the front of the class and the tables in the back of the room.

ADVANCED CRANIOSACRAL THERAPY

Participants are required to make a deposit of \$500 in order to be put on the waiting list for an ADV class. A photograph of themselves along with a letter stating how they are utilizing CST in their practice now, what they would like to obtain from the ADV class and how they would like to use CST in the future must also be submitted as part of their application. After the application is approved the participant will be contacted and advised of available class dates. Only Bryna Mellot can place participants in a particular ADV classes. Facilitators can register them in a holding class:

ADVC	Participant has not completed SERII
ADVB	Participant has completed SERII but application not yet approved
ADVA	Participant's application has been approved

SYMPOSIUM

AV / ROOM REQUIREMENTS

1 chair for each participant
1 massage table in center of room or on a stage
Chair at head of table
Microphone
Gloves
Kleenex

DISCOUNTS

Check Info screen for individual discounts.

OTHER

Collect Release Form from patients participating.

SHARECARE

AV / ROOM REQUIREMENTS

One table (6' x 30") for every two participants
1 chair for every participant
10 stacked chairs
See instructor requirements
Microphone

HANDOUTS

Study Guide - registration
Evaluations at end of day
Certificates

RECOMMENDED READING

Your Inner Physician and You

DISCOUNTS

\$50.00 off CSI when therapists register at Sharecare (may vary by location).
\$15.00 Sharecare tuition for family members of UI employees
\$25.00 Sharecare tuition for senior citizens
Stillpoint Inducer/Inner Physician package \$25.00
10% off if 5 or more people sign up together.

LYMPH DRAINAGE THERAPY 1

AV / ROOM REQUIREMENTS

Microphone

Slide Projector and screen- all 4 days

1 Airmats for every 2 participants

1 6' X 30" table for every 2 participants

Extra stacked chairs

Tables and chairs in back for Teaching Assistants

HANDOUTS

Study Guide – Registration

Map of Foot – Day 1

Lymph circulation handout – Day 2

LDT II Coupon –Day 3

Evaluations – Day 4

Certificates – Day 4

REQUIRED READING

Silent Waves

RECOMMENDED VIDEOS

Video- Dissection of the Human Lymphatic System

OTHER

Participants bring in massage tables (talk about how to deal with it).

LYMPH DRAINAGE THERAPY 2

AV / ROOM REQUIREMENTS

Microphone

Slide Projector and screen- all 4 days

Airmats – 1 for every 2 participants

1 6' X 30" table for every 2 participants

Extra stacked chairs

Tables and chairs in back for Teaching Assistants

HANDOUTS

Study Guide – Registration

Map of Foot – Day 1

LDTHI Coupon – Day 3

Evaluations – Day 4

Certificates – Day 4

REQUIRED READING

Silent Waves

RECOMMENDED VIDEOS

Video- Dissection of the Human Lymphatic System

DISCOUNTS

Repeat tuition - \$300.00 to repeat LDT2

Participants receive \$100.00 off LDT3 with \$250 deposit before end of LDT2

LYMPH DRAINAGE THERAPY 3

AV / ROOM REQUIREMENTS

Microphone

Slide Projector and screen- all 4 days

1 Airmat for every 2 participants

1 6' X 30" table for every 2 participants

Extra stacked chairs

Tables in back for Teaching Assistants

HANDOUTS

Study Guide – Registration

LDTA Coupon – Day 3

Certificates – Day 4

Evaluations – Day 4

REQUIRED READING

Silent Waves

RECOMMENDED VIDEOS

Video- Dissection of the Human Lymphatic System

DISCOUNTS

Repeat tuition - \$300.00 to repeat LDT3

Participants receive \$100 off LDTA with \$250 deposit made before end of LDT3

ADVANCED LYMPH DRAINAGE THERAPY

AV / ROOM REQUIREMENTS

Microphone

Slide Projector and screen- all 4 days

1 Airmats for every 2 participants

1 6' X 30" table for every 2 participants

Extra stacked chairs

Tables and chairs in back for Teaching Assistants

HANDOUTS

Study Guide – Registration

Evaluations – Day 4

Certification – Day 4

REQUIRED READING

Silent Waves

RECOMMENDED VIDEOS

Video- Dissection of the Human Lymphatic System

DISCOUNTS

Repeat discount - none

OTHER

Recommend attending the Heart Centered Therapy class

LDT'S LYMPHADEMA/CDP CERTIFICATION

AV / ROOM REQUIREMENTS

Microphone

Screen- DAY 2 & 3 (check with Instructor)

Airmats – only 5 or so are needed

1 6' X 30" table for every 2 participants

Tables and chairs in back for Teaching Assistants

TV/VCR – (see meeting planner for which days)

HANDOUTS

Study guide – Registration

Evaluation – Day 6

Certificates – Day 6

REQUIRED READING/ VIDEO

Silent Waves

Dissection of the Human Lymphatic System Video

RECOMMENDED READING

Lymphedema: A Manual of Forms and Letters

DISCOUNTS

None

COMMONLY ASKED QUESTIONS

1. Q: What is CranioSacral Therapy?

A: The Upledger Institute's CranioSacral Therapy is a gentle, non-invasive hands-on technique that helps detect and correct an imbalance in the craniosacral system, which may be the cause of sensory, motor or intellectual dysfunction.

2. Q: How does CranioSacral Therapy as taught by Dr. Upledger differ from the cranial work taught by Barnes?

A: Barnes' courses emphasize myofascial release, which is a deeper technique than CranioSacral Therapy. John Barnes was trained by Dr. Upledger and modified the techniques to accommodate his methodology.

3. Q: If I've studied craniosacral therapy with people other than The Upledger Institute, can I begin with the Upledger Institute's CranioSacral Therapy II class?

A: No. Although there may be similarities between the different methods of CranioSacral Therapy, The Upledger Institute can only vouch for the content of their own courses. It is essential to begin CranioSacral Therapy II with a thorough knowledge of the techniques covered in The Upledger Institute's CranioSacral Therapy I seminar.

4. Q: Did Dr. Upledger create this work?

A: Dr. Upledger incorporated techniques from Still and Sutherland, Cranial Osteopaths, but is credited with researching the craniosacral system over 7 1/2 years at Michigan State University. He is responsible for the development of the 10-Step Protocol used by many practitioners of CranioSacral Therapy.

5. Q: Who can participate in the classes?

A: The CranioSacral Therapy I course can be taken by any healthcare professional. Students in this field may also participate in the course and receive a discount. Primary caregivers who are not in the healthcare field are allowed to take the course with the understanding that it does not give them a license to practice the work and must sign a waiver to that effect. The intention is to allow caregivers to learn CST to provide to their loved ones.

6. Q: What if I register for a course and can't make it?

A: Your deposit can be transferred to another course at any time without any penalty. Full refunds can be given for courses when cancelled with at least two weeks notice. Requests for refund must be submitted in writing. There is a \$50 processing fee if cancelled within 2 weeks of the course. Refunds will be processed in approximately 30 days from the date UI receives the written refund request. Refunds will be given back to the participant the way they originally paid. (i.e. by check or by credit card).

7. Q: Is there any documented research on CranioSacral Therapy?

A: We have an entire list of research articles we can send to anyone who requests it – also available on the website.

8. Q: How long is an average treatment?

A: An average CranioSacral Therapy treatment lasts between 50 minutes and one hour but several of the techniques can be completed in just a few minutes.

9. Q: Are your therapies insurance billable?

A: Many of the techniques we use are insurance billable:

Myofascial Release:	#97250
Manual Traction	#97012
Kinetic Activity/Range of Motion	#97530
Massage	#97124
Manipulation	#97260
Therapeutic Exercise (self help)	#97110
Unlisted Medical Process	#97799

10. Q: Is CranioSacral Therapy successful with Multiple Sclerosis?

A: We have had success. Our Brain and Spinal Cord Dysfunction Center was given a three-year grant from the MS Foundation.

11. Q: What does CranioSacral Therapy do for those with Alzheimer's disease?

A: It balances the central nervous system for overall increased energy.

12. Q: What is the history and development of your therapies:

A: Your Inner Physician and You can answer this question.

13. Q: Are your therapies similar to shiatsu or any other acupressure method?

A: No.

14. Q: Can I get Continuing Education Credits (CEU) for your seminars?

A: That will depend on the seminar you are taking, the board to which you will be applying and the state in which you are applying. You will receive a letter from UI after completion of the course, which will state that you were in attendance and the amount of contact hours recognized in each course. Typically, UI three-day courses are 18 contact hours and UI four-day courses are 24 contact hours. Information on which boards recognize our classes is available through the 800 number and on www.upledger.com.

Q: Can I be certified in your courses?

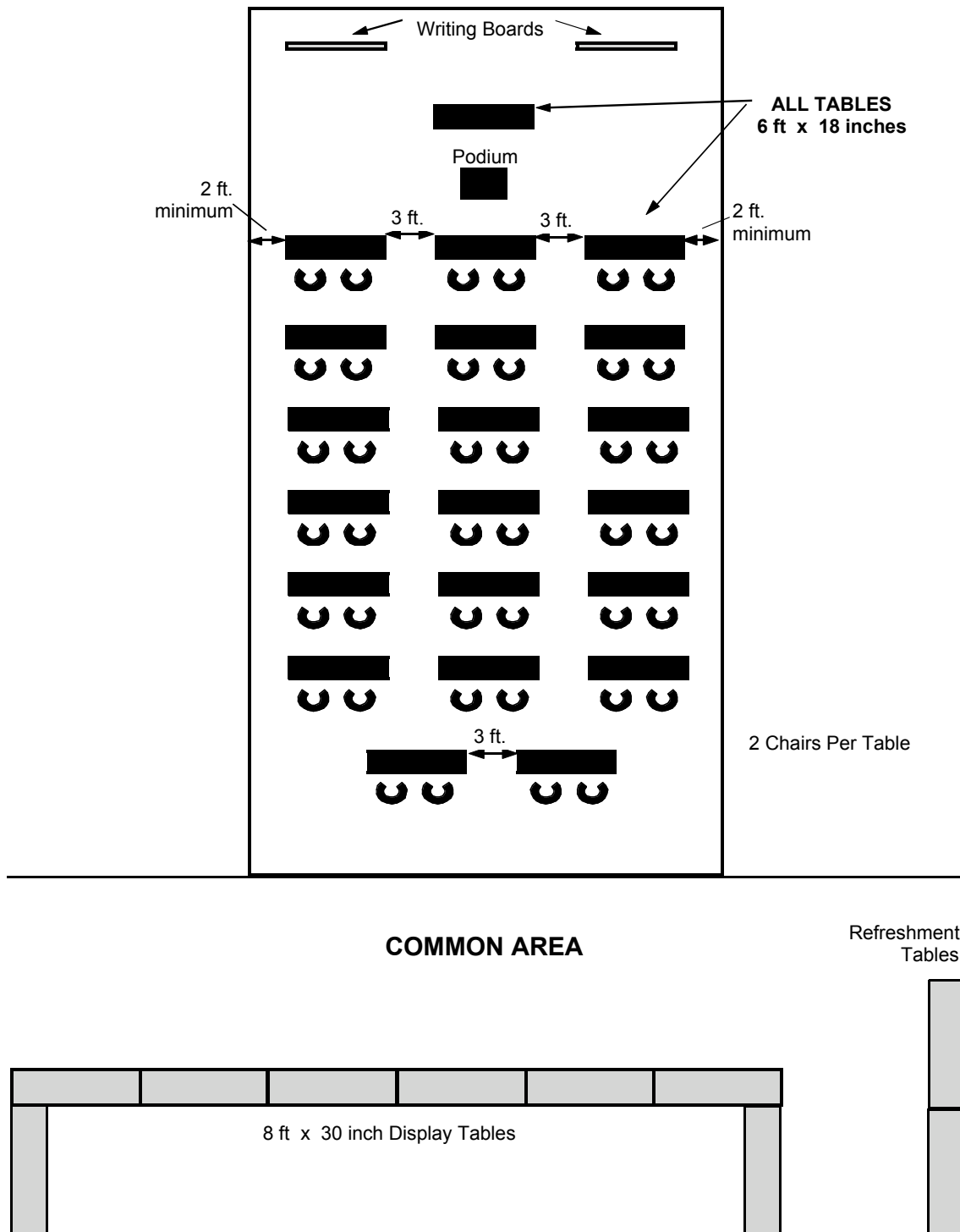
A: We do have a program for certifying CranioSacral Therapy and Lymphatic Drainage participants. There is also a program for Core Zero Balancing, Neuromuscular Therapy and Process Acupressure participants.

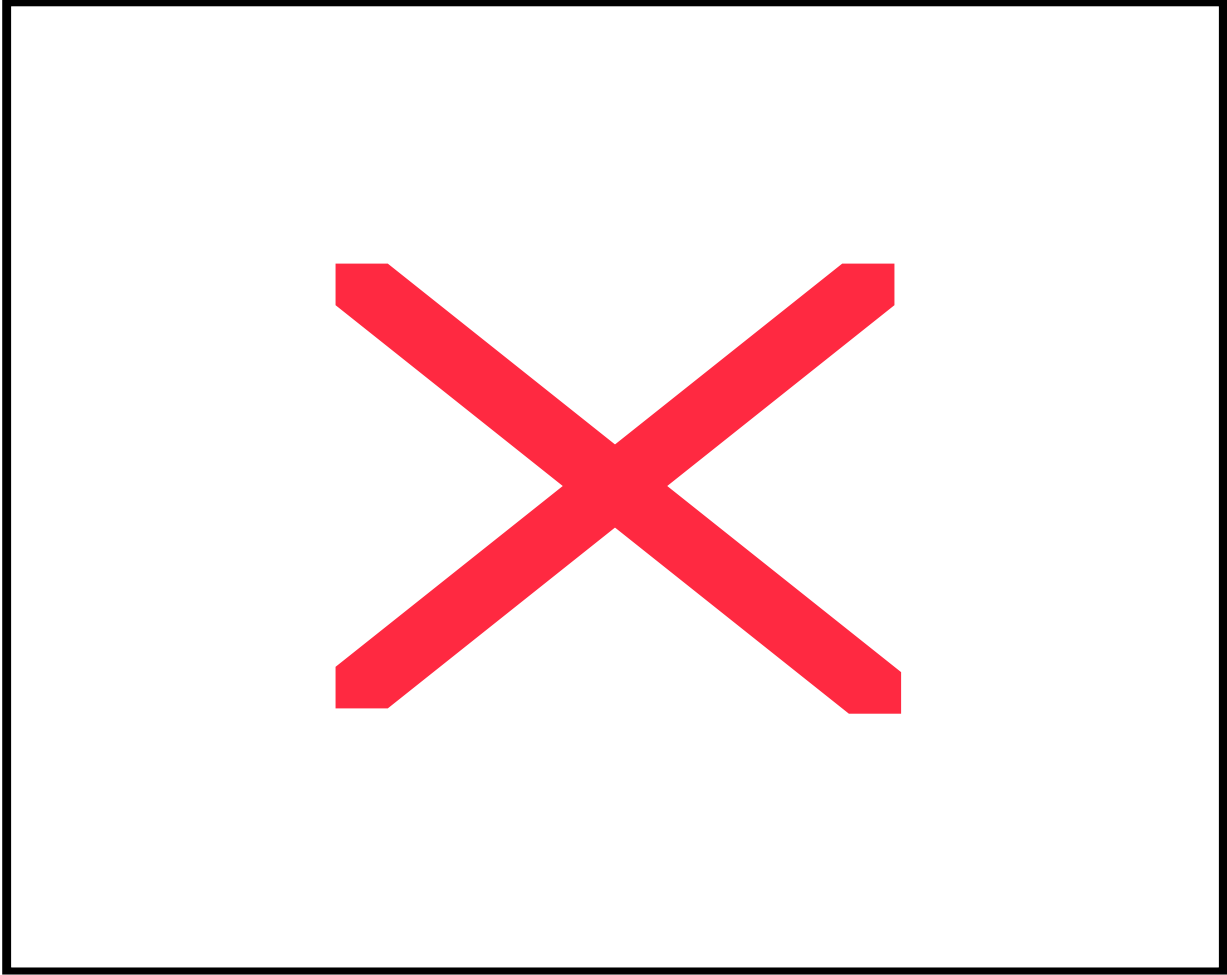
ROOM SET-UP DIAGRAMS

CSI CLASSROOM LAYOUT

This layout is generic and subject to slight changes depending on room size and number of attendees.

Check with the catering department for the exact number of tables.





SUMMARY

1. Make the seminar an enjoyable experience for the students. Be outgoing. Help them whenever you can. Be a source of information to them.
2. Support the instructor. Ensure their only concern is the teaching of the material.
3. Promote the courses and our educational materials. Know your products.
4. Eliminate unnecessary expenses.
5. Represent UI professionally.

Helpful Hints

If you have hints you find helpful and would like to add, please forward to Jill Randall

- When you have time, use small sticky notes and put product code and price on each product. The participants will easily see the price. If it is the last copy being purchased, display with the participants name on the note.
- When participants are adding items to their bags, it may become hectic. Keep the bags in alphabetical order and place the items in their bags without writing out receipts. When class resumes, you can go through the bags and write up the payment information.
- Don't forget to add the items to the participant's receipt that you have left on display with their name on it. Note on the receipt that that item is on the table. Put a check mark on the sticky note so you know it has been recorded.
- Tape the display cards (colored sheets with class schedules on them) together and tape to the wall. Place an asterisk (*) by the seminars that are in close proximity.

