



# **REGION DIRECTORS**

## **POLICY and PROCEDURES**

Approved January 26, 2017

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## I. Introduction

### A. Outline of the Board of Directors Responsibilities to the Association and Its Membership

All elected Directors have a primary responsibility in governance with a fiduciary duty to the association. This includes, but is not limited to, the following responsibilities (in descending order of importance):

1. Monitoring and managing the Association's fiscal policies and financial health.
2. Developing and reviewing the Association's Mission and Vision through its strategic plan, policies and procedures.
3. Ensuring the Association's compliance to applicable laws and regulations.
4. The administration of the Board of Directors policies and procedures, committee missions and other volunteer activities.
5. In addition to the above requirements (but not limited to):
  - All Board members have a responsibility for the function, purpose, operation and activities of the Board of Directors and for the representation of all members and stakeholders as defined in the BICSI By-Laws and the Board of Director's Policies and Procedures.
  - Region Directors, by definition, have a distinct and focused responsibility to their particular region. They are solely elected by their region members to represent, communicate and interact with the region's membership and stakeholders.  
In some case, especially those of the Global Region Director, travel is too restrictive so other means of interaction need to be used such as Skype, "Go to Meeting", "Whats App" and other methods of communication.
  - Refer to the Board's Policy and Procedures for additional details.

### B. Region Director Activities

Region Directors are responsible for hosting a minimum of two and a maximum of four Region Meetings per year\* (see note below). BICSI's Conferences & Events Department is committed to the complete support of Region Meetings to ensure their success.

Region Meetings (also refer to sections II, paragraphs A. & B. below):

- Are "Full-day" (held on a single day, typically from 7:30 a.m. to 4:30 p.m., including continental breakfast, breaks and lunch) meetings, hosted or co-hosted by the individual Region Director(s).
- Provide up to a maximum of 6 continuing education credits (CECs\*\*\*) to attendees.
- Will have vendor displays and may include 4 to 5 minute "What's New - What's it Do" presentations given by participating vendors.

- Require the Region Director and Region Director Co-host (if any) to be in attendance at their Region Meetings.

**NOTE:** Because of the distances involved and challenges of travel (e.g.-costs, time, etc.) the responsibility of the Global Region Director to host region meetings has been waived.

By definition, a Region Director, in addition to other duties such as governance, is a Budget Manager. As a Budget Manager, he or she is responsible for all BICSI activities and events in his or her region including the submittal and management of his or her region's budget. It is the Region Director's responsibility to monitor all sanctioned activities (including, but not limited to, vendor contributions, sponsorships, travel costs, venue expenses, door prizes, guest and speaker expenses, etc.) to ensure that they are within the scope and limits of the approved budget. However, in the case of an unforeseen activity, or event, the Region Director can submit a special action request form (ARF) to the Finance and Audit Committee for consideration.

*\* Refer to section II.B, "Co-Hosting Region Meetings" for further explanation.*

*\*\* Refer to section VI for CEC details.*

## **II. Planning Basics for Region Meetings**

The following information is intended to assist Region Directors in hosting successful Region Meetings. It provides guidance and uniformity between events, as well as an understanding of the coordination between the Region Director and the staff person assigned to assist the Region Director in this process—either the BICSI Manager for Conferences & Events or the BICSI Sr. Meetings & Events Planner. For ease of reference throughout this document, these two positions will hereinafter be referred to as the "Conferences & Events staff."

### **A. Choosing the Meeting Date, Location and Venue**

- The Region Director should select a date and location for Region Meetings one year to six months prior to the scheduled events. Items of note for this process are:
  - o Region Meetings are not to be held not less than 30 calendar days, before or after, a major U.S. Conference (e.g. - two full days or more ).
  - o Region Meetings shall not be scheduled within close proximity (2-3 hour drive) to a conference venue within the same twelve month period (e.g., Niagara Falls, Canada and Buffalo, N.Y. or Vancouver, Canada and Seattle, WA.) unless given one time approval by the President and BICSI Executive Director & CEO.

- o Thursdays have typically worked well for Region Meetings.
  - o Consider holding Region Meetings at a University or College and promote a career in BICSI (e.g. Installer) and provide a \$500 BICSI Next Generation Scholarship (see Section on Scholarship)
  - o Avoid religious holidays.
  - o Avoid spring breaks, if possible.
  - o Consider major athletic events being held in the area or televised (e.g., NCAA Basketball Final Four, Baseball World Series, etc.).
  - o Consider non-BICSI trade shows or events (e.g., InfoComm).
  - o Consider the BICSI training class schedule (holding Region Meetings in conjunction with BICSI training classes may increase attendance for both).
  - o To identify member concentration, Conferences & Events staff can provide the Region Director with a list or count of members for a particular city or area.
- The Region Director will provide the Conferences & Events staff with his or her choice of area/city and dates for upcoming Region Meetings. The Region Director may include information on a past venue(s) that has worked well for a particular Region Meeting(s). The Conferences & Events staff will then research possible venues in the area/city, to include the Region Director's suggested venue(s), if any, and provide the Region Director with a list of venue options from which to choose.
  - The Conferences & Events staff conducts all venue negotiations and handles all logistical arrangements, including meeting room setups, food and beverage orders, guestroom requirements and audiovisual needs, etc. Any and all contracts related to a Region Meeting must be signed by an authorized staff signatory.
  - Drawings for free "give-aways" (e.g. "Door Prizes") shall be limited to:
    - o Vendor provided gifts.
    - o BICSI official products (e.g.-apparel, educational material, etc.).
 Purchase of third party items for "give-aways" is not allowed (e.g.-tools, sporting goods, non-BICSI event tickets, etc.).
  - In an effort to introduce BICSI –training, publications and credentials - to emerging professionals, local hosts have access to a bursary to offer educational institutions (e.g., trade schools, community colleges, etc.) a scholarship in exchange for discounts for meeting rooms, catering, AV equipment, etc. The BICSI Next Generation scholarship (\$500) was created in 2008 as a way to thank technical schools that allowed Region Meetings to be hosted in their facilities. The Next Generation scholarship is awarded to a deserving student in a college-level IT program. It represents the association's focus to reach out to the next generation of IT, engineering and other ICT professionals to help them to achieve their knowledge-based goals.

NOTE: More information on the BICSI Next Generation scholarship can be found in appendix for BICSI Next Generation Scholarship Procedure on page 26.

## **B. Co-Hosting Region Meetings**

While, as noted above, each Region Director is required to host a minimum of two and a maximum of four Region Meetings per year, he or she may elect to work with another Region Director to co-host a Region Meeting in a proximal city or state. Since BICSI is divided into six geographic Regions (the global region is excluded because it is not a localized region), there is an opportunity to host 24 Region Meetings per year (6 Regions x Max 4 RM per year = 24 RM). If the Region Directors so desire, they may work together to co-host Region Meetings. These meetings can be advantageous to the association, Region Directors, members and vendors. Co-hosted Region Meetings shall count as one of the four authorized meetings for each region involved.

No region will have more than four (4) regional meetings (including co-hosted meetings) in any given calendar year. The only exception involves the Canadian Region. A fifth (5) Region Meeting can be scheduled in the alternate year when a Canadian Conference is not scheduled. Any other exception must be approved by the *President*. A special action request form (ARF) is to be presented, for one-time approval, to the President in consultation with the Finance and Audit Committee.

Both Region Directors must be fully informed and commit to a co-host arrangement from the outset. No individual Region Director may elect to co-host a Region Meeting without the full knowledge and consent of his or her co-host. Written communication and documentation on the part of both co-hosts is required in order to move forward, and BICSI Conferences & Events staff must be fully informed of the arrangement in writing from its inception.

Finally, the regions must be proximal (adjacent) in order for a co-host arrangement to exist. For example, based on geography, the Canadian Region Director and the Southeast Region Director would not be able to co-host a Region Meeting but Southeast and South Central could.

## **C. Financial**

- Attendee registrants for Region Meetings are charged a registration fee. At their discretion, Region Directors may offer complimentary registration to Region Meeting presenters.
- Typically vendors exhibiting at Region Meetings are charged fees for their participation. Region Directors have flexibility in offering vendor discounts and/or complimentary vendor tables (a Region Meeting presenter may be offered a complimentary vendor table, for example).
- All companies in the ICT or related industries are welcome and encouraged to participate in Region Meetings as vendors and/or sponsors. The limits of space

availability may preclude such participation; otherwise, Region Meetings are open to all ICT (or related) companies that apply and make payment to be vendors and/or sponsors.

- Companies that have agreed to participate in a Region Meeting as a Vendor or Sponsor shall have their logo and promotional material posted on the BICSI website. This website posting will occur after receipt of "full payment".
- All expense reports for the meetings shall be submitted to the Conferences & Events staff for processing.
- Region Directors, as Budget Managers, are responsible for managing meeting expenses to ensure that they are within the intent and limits of the approved budget.
- All Co-Hosted Region Meeting revenue and expenses are split 50/50 between the regions except for the travel expense for the Region Director which is applied to his or her Region only.

### **III. Region Meeting Process - Planning Calendar**

#### **Region Director**

- By no later than November 1<sup>st</sup> (or first workday in November) of each year, Region Directors will provide to the Conferences & Events staff the dates and city/area for all of the next year's proposed Region Meetings including any co-hosted locations. It is at this point that discussion of potential conflicts and "bottlenecks" is to occur before any meeting arrangements are made.
- Region Directors identify speakers for Region Meetings. A link to the Region Meeting Call for Presentations/presenter applications is included in the *Region Connections Newsletter* and is posted on the Region Events web page.
- Select date and meeting locale.
- Send date and locale information to the Conferences & Events staff.
- If particular presenters have been identified, provide the Conferences & Events staff with contact information.

#### **Twelve to Nine Months before Region Meeting**

#### **Region Director**

- Work with BICSI Marketing staff on promotional articles and information to include in Region Newsletters and social media.
- Marketing staff to post Region Directors' promotional articles, excerpted from Region Newsletters, on individual Region Director web pages.
- Send approval or disapproval of presenter applications to Conferences & Events staff within one to two weeks of receipt of application.

- Select Region Meeting venues from list of options presented by Conferences & Events staff.

### **Conferences & Events Staff**

- Present venue options to Region Director.
- Contract terms are negotiated by the Conferences & Events staff, and the contract is signed by an authorized staff signatory.
- Determine food and beverage requirements.
- Send meeting specifications to the hotel/meeting facility.
- Add Region Meeting to BICSI database to open online registration and push all data to pertinent pages on the BICSI website.
- Make payment arrangements with meeting venue.

### **Three Months to Six Weeks before Region Meeting**

#### **Region Director**

- Continue to work with BICSI Marketing staff on promotional articles and information to include in Region newsletters and social media.
- Submit presenter contact information to Conferences & Events staff.

### **Conferences & Events Staff**

- If the Conferences & Events staff has been asked by the Region Director to assist with securing speakers for a Region Meeting, the Conferences & Events staff is to submit presenter(s) applications to the Region Director.
- Send confirmation to prospective presenters that applications have been received and submitted for consideration.
- Upon selection, send acceptance form and presentation deadline dates to presenters.
- In collaboration with the Region Director, develop meeting agenda, to include speakers for "What's New, What's It Do" where applicable.
- Add agenda information to BICSI database (this will push information to BICSI website).
- Process submitted sponsorship applications.
- Create sponsorship spreadsheet with all relevant data for Region Director's use.
- Add sponsor information to BICSI database (this will push information to BICSI website).

## **Four Weeks before Region Meeting**

### **Region Director**

- Continue to work with BICSI Marketing staff on promotional articles and information to include in Region newsletters and social media. Content for the broadcast e-mail (e-blast) should be developed with BICSI Marketing staff during this timeframe (Refer to Section VIII).
- Work with the Conferences & Events staff or, separately, to set up speakers' dinner for night before meeting. Hosting a speakers' dinner is optional and completely at the discretion of each Region Director.
- Region Director shall be responsible for his or her own travel arrangements, including air and ground transportation and hotel guestroom reservations. Expenses to come from the Region budget.

### **Conferences & Events Staff**

- BICSI Conferences & Events staff provides the submitted PowerPoint presentations to BICSI PD staff to ensure presentations are vendor neutral and adhere to BICSI presentation guidelines.
- Finalize food and beverage and audiovisual requirements.
- Make arrangements for BICSI staff travel (see Section IV for guidelines related to BICSI Staff support at Region Meetings)

## **Two Weeks before Region Meeting**

### **Region Director**

- Continue to work with BICSI Marketing staff on promotional articles and information to include in Region newsletters and social media.
- Determine whether BICSI literature is needed for distribution at the Region Meeting; if so, request Conferences & Events staff assistance in shipping it.

### **Conferences & Events Staff**

- E-mail "Know Before You Go" message to vendors and speakers.
- Proof and return signed Banquet Event Orders to meeting venue.
- Work with venue CSM/onsite contact on any changes related to food and beverage orders, audiovisual requirements and/or other logistical arrangements.
- Prepare and copy certificate request form, meeting evaluation, door prize certificates, attendee roster and agenda.
- Send presenters and sponsors meeting information. This includes venue address, meeting room name, audiovisual setup and agenda.

## **One Week (7 to 2 two days) before Region Meeting**

### **Region Director**

- Seven days before meeting is the last opportunity to send a broadcast email to region members (refer to section VIII).
- Continue to work with BICSI Marketing staff on promotional articles and information to include in Region newsletters and social media.
- Continue to work with BICSI Marketing staff on social media outreach.

### **Conferences & Events Staff**

- Ship door prize certificates, certificate request forms, meeting evaluations, onsite registration forms, and agenda. Ship BICSI literature if requested by Region Director. The BICSI Facilities Department will include an overnight envelope and air bill for the Region Director to return evaluations, roster, and certificate request forms to BICSI.
- E-mail "Know Before You Go" message to Region Director and Region Meeting registrants.
- Provide final guarantee for food and beverage to the meeting venue by guarantee date.
- Follow-up with Region Director to ensure there are no questions or concerns.

## **During the Region Meeting**

### **Region Director**

- Use volunteers or a BICSI staff member [see Section IV for guidelines related to BICSI Staff support at Region Meetings]) to assist in attendee registration. The Conferences & Events staff will provide a roster of names of attendees who have preregistered for the event, along with on-site registration forms for use by those who have not preregistered.
- Indicate Region Meeting attendance for each attendee by marking them off on the roster provided by the Conferences & Events staff. If the attendee's name is not included on the roster and he/she has proof of registration, include attendee information on the back of the roster provided. For those who register onsite, utilize the provided registration forms and note information on the roster form.
- Encourage non-members to become BICSI members; Region Directors will have membership applications available for such purpose.
- Manage the overall meeting operations, including presentations and What's New, What's It Do (WNWID) session.

## **After the Region Meeting**

### **Region Director**

- Send attendee roster, evaluation forms and certificate request forms to Conferences & Events staff within two weeks of the Region Meeting.
- Send any completed membership applications, sponsorship forms and on-site registrations to the Conferences & Events staff within two weeks of the Region Meeting.
- Submit final Expense Reports to Conferences & Events staff for reimbursement within 30 days or less of the Region Meeting.

### **Conferences & Events Staff**

- Update the BICSI database using the information contained in the attendee roster, so CECs will be credited to each attendee.
- Process any sponsorship and registration forms returned with the meeting materials.
- Submit Region Meeting PowerPoint presentations to the Marketing Department for website upload.
- Obtain a copy of the final invoice from the meeting venue and process for payment.

## **Within One Month after the Region Meeting**

### **Conferences & Events Staff**

- Tabulate evaluations and send the results to the Region Director and presenters.

## **IV. BICSI Staff Support at Region Meeting Location**

The Region Director may request the assistance of BICSI (Conferences & Events staff) at the Region Meeting location during the time of the event based on the following guidelines and criteria:

- All efforts to support the meeting via local volunteers shall be exercised before BICSI staff consideration.
- Attendance at the Region Meeting shall be greater than 40 attendees with a minimum of 5 vendors.
- The Region budget shall support all travel costs for the BICSI staff person.
- The request is to be made in writing to the BICSI Executive Director & CEO and Chief Executive Officer with proper justification and responses to these criteria.

## V. Speaker Selection

Region Directors will utilize speakers to provide industry or technical information at the event.

- A “master list” of presentations that have been given at Region Meetings and/or at BICSI Conferences is available for Region Director viewing via Dropbox. This list has been compiled and is maintained by Conferences & Events staff.
- Selecting speakers:
  - Region Directors must ensure that they have the right resource persons to achieve the program objectives. The meeting must *meet the needs of a varied audience*, including those new to the ICT profession, seasoned veterans, directors and support staff.
- Guidelines:
  - Presentations must be completely vendor-neutral—they may not be infomercials for vendors or specific brand name products. Commercialism of any kind is not acceptable and will not be tolerated by BICSI (the only exception being “What’s New, What’s it Do” presentations). Trade names, images of company-specific products and/or comparisons to other companies’ products are not allowed.
  - Presenters must strictly adhere to the industry topic that was chosen.
  - Presenters may not utilize a different version of the presentation than that which the Region Director and BICSI have approved.
  - As part of the overall acceptance process, presenters are to accept an agreement that provides information on Region Meeting deadlines and requirements. Additionally, BICSI requires all presenters to utilize a BICSI template PowerPoint background for their presentations. This PowerPoint template includes only one master slide. The presenter’s company logo may be included in the bottom right corner of the slide, but should be no larger than the BICSI logo on the slide template. No other alterations to the master slide are permitted. Everything on the master slide must appear on every slide of the presentation.
- When Region Directors approve presentations for Region Meetings, they are to select up to two additional applied presentations to serve as alternate presentations in the event the originally selected presentations are not submitted per the agreement.
- Presenters must agree to submit all presentations to BICSI no later than two weeks (14 calendar days) prior to the event. If a presenter cannot meet this requirement, then another presentation will be selected.
- The Conferences & Events staff will store all presentations on the BICSI FTP site for the Region Director to download to the presentation computer used on-site for the event. These are the final presentations that will be utilized for the event.
- Penalties for not adhering to the above guidelines and agreement:

- 1st violation will be verbal (email or phone call)
- 2nd violation will mean the presenter shall not speak at a BICSI-sponsored event for up to one year from violation
- 3rd violation will permanently ban the speaker from participating in any BICSI-sponsored event.

## **VI. Continuing Education Credits**

Continuing Education Credits (CECs) may be awarded for the technical portions of Region Meetings. Each approved one-hour presentation will provide attendees with one CEC.

The CEC Provider Services Administrator will maintain files for all Region Meetings and ensure completeness in the event of an audit.

CECs are to appear on each attendee's transcript no later than 30 days following a Region Meeting.

"What's New-What's It's Do" presentations (separate or combined) do not qualify for CECs.

## **VII. The Role and Responsibilities of Region Directors Concerning Region Meetings and Region Events**

### **A. Region Meetings:**

- Region Directors are responsible for coordinating and running these official, fully supported, BICSI one-day Region Meetings. Region Directors must be in attendance at all Region Meetings taking place within their respective Regions.
- If an illness or injury, family crises or mandatory job conflict occurs and the Region Director cannot attend the Meeting as planned, then the Region Director is required to notify the President and President-Elect so that arrangements can be made to have another current Board member cover the meeting. Volunteers can help organize and assist with the meeting but a current elected Board member must be present at the meeting to represent BICSI and to address questions regarding recent Board actions, strategic initiatives and related association policies.

Refer to sections I and II for additional details.

**B. Other Region Events (Breakfast Clubs, Lunch and Learns, Pub Clubs, etc.):**

- These activities are informal events that:
  - Are locally autonomous.
  - Are up to four hours in duration.
  - Can include up to three CECs in training.
- Region Directors are not responsible for organizing and operating these unofficial, minimally supported Region Events.
- Region Directors are not required to be in attendance at these events. However, Region Directors are responsible for assigning volunteers, supporting the initiatives and for monitoring budgeted expenses (if any).
- Although Region Directors are not required to attend these events they are encouraged to do so when their schedule and budget permits.

Refer to Region Event Guidelines document for more details on the organization and operation of these events.

## VIII. BICSI Broadcast (Blast) E-mail Policy

Type of email	Recipients	Quantity
Region Connection	A separate e-newsletter is sent out for each region to all members of that region	Scheduled monthly
Broadcast email (targeted email)	Regional members (State/ Geographical area of Region Meeting Site	One broadcast email (e-blast) per region may be scheduled but not within last week (7 days) before the event.
Emergency Broadcast email (email blast)	Regional members (State/ Geographical area of Region Meeting Site	Use only in case of Emergency (usually 2 to 7 days prior to event). See bullet #3 below.

### *Email Definitions/Rules*

1. A broadcast email is an email that is sent to a target group of more than 50 individuals.
2. Any email, regardless of intent, that will be sent to more than 25 individuals must be approved by the Marketing Department. The only exception to this are emails sent to BICSI committees.
3. Emergency Broadcast email ("email blast" or "e-blast") is defined as a special broadcast notification where there has been a last minute change of venue, a cancellation of the event, a change of date for the meeting due to acts of God (e.g.-prolonged severe weather, natural disasters, etc.), acts of terrorism, military conflicts, or major local political/social instability.

### *Procedure for Sending Broadcast Emails*

1. For the purpose of promoting region information and events, only two vehicles of communication will be used (the Region Connection e-newsletter, which is the *primary* form of region communications, and the Community UPLINK e-newsletter). A schedule has been set for both e-newsletters, although from time to time, adjustments may be made to the schedule on a case-by-case basis.

2. Region Directors are requested to email content for the Region Connection e-newsletter to the Marketing Department as indicated on the Region Connection E-newsletter Schedule (the Marketing Coordinator and the Marketing Manager must be included on the email).
3. Attachments cannot be sent via a broadcast email. If there is an attachment, please first submit it to the Webmaster to be converted into a URL (via BICSI Ticket System) before submitting it to Marketing.
4. Please send the message to Marketing as either a .txt or a Word file. Attachments may be in PDF only.
5. The Marketing Department will edit the content sent by the Region Director to the best of their knowledge for accuracy.
6. Once all information has been approved, the e-newsletter will be put into the blast email program and will be sent to the appropriate recipients as listed and scheduled above.
7. Region Directors are prohibited from sending their own broadcast emails ("e-blasts") to their region members.

## IX. Attachments



### Sample Region Connection E-newsletter Schedule

<b>Newsletter Issue Dates</b>	<b>Material Due Date</b>
<b>November 1, 2012</b>	<b>October 26, 2012</b>
<b>November 15, 2012</b>	<b>November 9, 2012</b>
<b>December 6, 2012</b>	<b>November 30, 2012</b>
<b>December 20, 2012</b>	<b>December 14, 2012</b>
<b>January 3, 2012</b>	<b>December 28, 2012</b>
<b>January 17, 2012</b>	<b>January 11, 2012</b>
<b>February 7, 2012</b>	<b>February 1, 2012</b>
<b>February 21, 2012</b>	<b>February 15, 2012</b>
<b>March 7, 2012</b>	<b>March 1, 2012</b>
<b>March 21, 2012</b>	<b>March 15, 2012</b>
<b>April 4, 2012</b>	<b>March 29, 2012</b>
<b>April 18, 2012</b>	<b>April 12, 2012</b>



Sample Region Meeting Shipping List

**Region:**

**Date/Location:**

Items to pack	Quantity	Packed
Agenda		
On-site Registration Forms		
Certificate Request Forms		
Evaluation Forms		
Door Prize Certificates		
Region Meeting Roster		
BICSI Sponsorship Forms		
Stick-on Name Badges		
Sharpies		
Overnight Return Envelope/Pak		
Marketing Materials		



Sample Agenda

BICSI Northeast Region Meeting Agenda

October 16, 2012

Marriott Downtown Providence

Providence, RI

**8:45 a.m. Welcome, Introductions and BICSI Overview**  
Carol Everett Oliver, RCDD, ESS, Northeast Region Director

What's New, What's it Do?  
Presentations on New Products or Services

**Energy Savings Best Practices**  
Vinnie Jain, CDCP, Ortronics/Legrand

**Specifying Optical Fiber for Data Center Applications**  
Tony Irujo, OFS

**What is an Intelligent Building?**  
Ernest Schirmer, Acentech, Inc.

**Public Address/Paging System Speaker Placement and Wiring Guidelines**  
Robert B. Hertling Jr., RCDD, OSP, Parsons Corp.

**Greening the Data Center and Your Company's Bottom Line**  
Victor Avelar, APC by Schneider Electric

**3:30 p.m. Q&A, Closing Remarks, Door Prizes**

Showcase Vendors:



Sample Certificate Request Form

Canadian Region Meeting  
Certificate Request Form  
November 6, 2012  
Ottawa, ON

To receive a certificate for attending this BICSI Region Meeting, please complete the following information and return it to the Region Director at the conclusion of the meeting. Please print.

---

---

Name Member number

---

Company name

---

Mailing address

---

City State/Province Zip/Postal code Country

---

Signature

---

Phone Fax Email



Evaluation Form

**BICSI (Region) Region Meeting**

**Date**

**Location**

PLEASE CIRCLE ALL APPROPRIATE INFORMATION WITH 5 BEING EXCELLENT AND 1 BEING POOR. Return this evaluation to the Region Director at the conclusion of the meeting.

**1. Welcome, Introductions and BICSI Overview**

<u>Content</u>	<u>Delivery Skills</u>	<u>Visual Aids</u>
5 4 3 2 1	5 4 3 2 1	5 4 3 2 1

Comments \_\_\_\_\_

**2. Presentation Title – Presenter Name and Company**

<u>Content</u>	<u>Delivery Skills</u>	<u>Visual Aids</u>
5 4 3 2 1	5 4 3 2 1	5 4 3 2 1

Comments \_\_\_\_\_

**3. Presentation Title – Presenter Name and Company**

<u>Content</u>	<u>Delivery Skills</u>	<u>Visual Aids</u>
5 4 3 2 1	5 4 3 2 1	5 4 3 2 1

Comments \_\_\_\_\_

**4. Presentation Title – Presenter Name and Company**

<u>Content</u>	<u>Delivery Skills</u>	<u>Visual Aids</u>
5 4 3 2 1	5 4 3 2 1	5 4 3 2 1

Comments \_\_\_\_\_

**5. Presentation Title – Presenter Name and Company**

<u>Content</u>	<u>Delivery Skills</u>	<u>Visual Aids</u>
5 4 3 2 1	5 4 3 2 1	5 4 3 2 1

Comments \_\_\_\_\_

**6. Presentation Title – Presenter Name and Company**

<u>Content</u>	<u>Delivery Skills</u>	<u>Visual Aids</u>
5 4 3 2 1	5 4 3 2 1	5 4 3 2 1

Comments \_\_\_\_\_

**7. Event Details**

<u>Location</u>	<u>Meeting Facility</u>	<u>Meal (if applicable)</u>
5 4 3 2 1	5 4 3 2 1	5 4 3 2 1

Comments \_\_\_\_\_

**8. Overall Rating of Meeting**

5 4 3 2 1

**9. About You**

- I am a BICSI member? YES NO
- If no, would you like to receive more information about BICSI?
- If yes, please complete the following:

\_\_\_\_\_

name

\_\_\_\_\_

company name

\_\_\_\_\_

mailing address

\_\_\_\_\_

city

state/province

zip/postal code

country

\_\_\_\_\_

phone

fax

e-mail

\

Thank you for participating in this BICSI Region Meeting.



Sample Evaluation Response Report

**Canada BICSI Region Meeting  
November 6, 2008, Ottawa, ON - Meeting Evaluation Report**

**1. Welcome Introductions and BICSI Overview**

Content	3.88	18 Responses
Delivery Skills	3.94	18 Responses
Visual Aids	3.61	18 Responses

Comments:

- Very good overview

**2. Bringing Value to Today's Data Centers – Joe Oreskovic, Eaton Power Quality Co.**

Content	4.33	18 Responses
Delivery Skills	4.33	18 Responses
Visual Aids	4.05	18 Responses

Comments:

- Very personable, quick of wit & good content
- Good info
- Very informative, well done – should use him at the Winter conference.
- Excellent presenter

**3. Cabinet Thermal Management In and Out of the Equipment Room – Randall Thomlinson, RCDD, Cable Talk Systems**

Content	3.44	18 Responses
Delivery Skills	3.38	18 Responses
Visual Aids	3.27	18 Responses

Comments:

- Good presentation, needs a little polish – racing slides
- Good info

**4. Event Details**

Location (Ottawa, ON)	4.37	16 Responses
Meeting Facility	4.31	16 Responses
Meal	4.12	16 Responses

Comments:

- Equipment failure
- Good place for a meeting

- Cold
- Toronto is good for me
- Better audio
- Easily accessible
- Very well done – thank you

## 5. Event Summary

- Overall rating of meeting **4.2**
- BICSI Member evaluation responses

Member	Nonmember	Unmarked
14	1	4

## **BICSI Next Generation Scholarship Procedure**

The BICSI Next Generation Scholarship is currently only awarded in BICSI Regions. It is given out to schools that allow BICSI Region Meetings to be held at their location, and is awarded in the amount of US\$500 for each Region Meeting held at that school.

For any Region Meeting held at a school in the Region, the Region Director communicates this scholarship provision to the school. If the Region Director chooses to do this, there is a form letter he/she may use that the Region Meeting Coordinator can provide. The yellow highlighted areas are the only portions that would need to be updated to reflect the proper school/Region Director information. Currently, there is nothing BICSI staff does to spearhead this process.

After the Region Meeting, usually around the time of year in which the school holds its awards ceremonies (although it can be at any time after the Region Meeting has been held), the school representative (i.e., the person who has been working with the Region Director in coordinating the Region Meeting) will let the Region Director know that the school has selected a recipient/recipients of the BICSI Next Generation Scholarship. The Region Director may also follow up with the school representative to see if the scholarship recipient has been selected.

The school selects the recipient, not BICSI. However, BICSI does ask that the recipient be selected based on achievement and need.

The Region Director then communicates this information to the Region Meetings Coordinator, who will let the Marketing Department point person overseeing the scholarship process know that there is a new scholarship needed. The Marketing Department point person will need the following in order to carry out the award process:

- the name of the school,
- the address of the school,
- the school's representative who is coordinating this with the Region Director and
- the name of the student(s) receiving the scholarship.

The Marketing Department point person then prints a certificate with the scholarship recipient's name on it (template for certificate can be found in the same folder listed above). Make sure the President, Executive Director/CEO and Region Director's name/signature is current. In addition, the Marketing Department point person updates and fills out the Next Generation Scholarship Thank You Letter (template can be found in the same folder listed above) to include with the scholarship and certificate. Highlighted areas on the template letter indicate anywhere that may need updating, but the point person should fully review the letter to ensure nothing is missed and the letter reads properly. The thank you letter should then be printed on BICSI letterhead.

Next, the Marketing Department point person fills out a check request. The payee is the school, not the student recipient, as the scholarship funds are not awarded directly to the student. The check is made in the name of the school and sent directly to the school, which is then responsible for awarding the funds to the student of their choosing. Also in the check request, include the address of the school and have it sent with an attention to the school representative.

The accounting code for the scholarship is 6005-60-6xx.

With the check request, paperclip the scholarship certificate, thank you letter and supporting documentation (i.e., the email regarding the scholarship and the chosen recipient; something for Accounting's records of why the money is being paid). Attach a note to the check request packet asking Accounting to send the scholarship certificate and thank you letter along with the check.

The scholarship may be paid out in parts to different students as the school sees fit. For example, the school may wish to award two \$250 scholarships as opposed to one \$500 scholarship. In this case, the procedure is exactly the same, and there only needs to be one check for the full amount of \$500, but the Marketing Department point person needs to create scholarship certificates for each recipient.

Accounting processes the check request and sends the check and certificates out accordingly.

Finally, the BICSI Next Generation Scholarship section of the BICSI website (the bottom of the page found here: <https://www.bicsi.org/single.aspx?l=1200,1190>) needs to be updated with the student's name and the month and year in which the scholarship was awarded. For example, an entry would read, "Rebecca Bullock, June 2008". The list of recipients is in ascending order. The scholarship recipient(s) should be also contacted by the Marketing Department point person for a photo and testimonial/quote for future use. Preferably, the photo would be of the student with the award, or receiving the award at the school.

# **BICSI Social Media Policy for Region Directors/Volunteers**

## **Policy Overview**

The following policy document applies to all current and future BICSI social media outlets, including but not limited to:

- Facebook
- LinkedIn
- Twitter
- YouTube

BICSI's social media work is meant to achieve the following goals (in no particular order):

- Build BICSI brand
- Improve the public image of the information and communications technology (ICT) industry
- Promote BICSI products and services.
- Engage the ICT community in discussions to build overall community.
- Build community for the BICSI members and professionals we serve.
- Grow BICSI membership and relevance.

## **Terms of Use**

Postings will not:

- Be offensive, threatening, illegal, or inflammatory, defamatory or hostile.
- Promote or advertise a commercial product or solicit business or membership to other organizations, unless approved by BICSI.
- Infringe on the rights of the organization or any individual or entity to include privacy, intellectual property or publication rights.

## **Handling of Posts**

BICSI reserves the right to:

- Ban future posts from people who repeatedly violate policy and procedure.
- Move, remove or edit comments at any time.

## **General Policies**

Social media is a way for BICSI Region Directors (RDs)/volunteers to take part in conversations related to our industry and BICSI.

RDs/volunteers are required to respect copyright, fair use and financial disclosure laws. They are required to protect sensitive information. RDs/volunteers should not publish or report on conversations that are meant to be pre-decisional or internal. RD/volunteer postings should not disclose any information that is confidential or proprietary to BICSI. If the RD/volunteer comments on any aspect of BICSI business, the RD/volunteer must clearly identify himself/herself as a BICSI Board Member, BICSI Committee Member or volunteer in postings and include a disclaimer on whether the views are his/her own or those of BICSI. To express views on behalf of BICSI, the RD/volunteer must secure prior approval from the BICSI President.

In addition, we ask that RDs/volunteers do not post advertisements or other items that are promotional in nature to the main Discussion tab of the LinkedIn group with the exception of promotion of BICSI Region Meetings.

BICSI members prefer the Discussions tab of the group to be focused on industry discussion. BICSI reserves the right to delete advertisements or promotions. Repeated posts of a promotional or advertising nature may result in removal from the group. Any advertisement or promotion that does not relate to the ICT industry will be promptly removed, and any other non-industry-related postings by that group member will result in immediate removal from the group.

Antitrust laws prohibit postings that encourage or facilitate commercial boycotts or agreements or discussions between members or credential holders concerning the following: prices, discounts, or terms or conditions of sale; salaries; profits, profit margins or cost data; market shares, sales territories, or markets; allocation of customers or suppliers; or any other term or condition related to competition.

BICSI requests that the RDs/volunteers keep copyright and trademark laws in mind when posting discussions. BICSI® and RCDD® are registered trademarks of BICSI, Inc. RDs/volunteers are not permitted to create groups related to BICSI-owned products and services, including BICSI and RCDD, anywhere, including on any social media outlets.

Job postings may be posted in or will be moved to the “Jobs” tab of the group. BICSI also maintains a separate area for job postings outside of LinkedIn. The website [www.ITS-Jobs.com](http://www.ITS-Jobs.com) is designed as the “go-to” resource for connecting ICT professionals with jobs.

### **BICSI Social Media Outlets**

Currently, BICSI maintains one Twitter, one Facebook, one YouTube channel and several LinkedIn Group pages (see below for a complete list of active official BICSI LinkedIn groups). In order to maintain a solid “one voice” and a singular message across all of BICSI’s social media outlets, each LinkedIn Group, Facebook page, Twitter handle, etc., is owned and/or moderated by a BICSI marketing/social media staff member.

BICSI maintains several regionalized LinkedIn Groups, one Twitter handle and one Facebook page. All region-focused activity and specialized communications may be handled on LinkedIn via BICSI’s smaller, more specialized official Groups as listed below. The BICSI Region Directors are welcome to post announcements regarding BICSI Region Meetings on any relevant BICSI LinkedIn site, provided they follow all other guidelines and refrain from posting more than once per week for each Region Event.