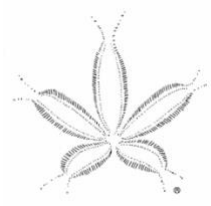
ORTHO-BIONOMY COORDINATOR PACKET



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Why Coordinate Classes?

Class coordinators are the grassroots of our Ortho-Bionomy communities. Coordinators create the environment necessary to nurture Ortho-Bionomy classes, community, and collaboration in their areas. There are many benefits of coordinating classes. Coordinators receive the classes they coordinate for free as long as the conditions with the Instructor are met. Coordinators also get to develop relationships with a variety of Instructors, which can help support the coordinator toward completing the SOBI Practitioner and Advanced Practitioner Training Programs. Coordinating classes can also be profitable. Once the Instructor makes their minimum for the class after expenses are covered, the Instructor and Coordinator split the profit along percentages previously agreed upon.

The Role of the Coordinator

Rosa M. Rodriguez, Advanced Instructor, LMT, MFA

Coordinators are the ambassadors of Ortho-Bionomy in their communities. Classes wouldn't be held without them and thus they are a vital element of the presence, integrity, and growth of Ortho-Bionomy. They are the local, on the ground representatives of the work, and SOBI is a grass roots organization dependent on their efforts.

Whether instructors coordinate classes themselves or work with other people who coordinate, it's beneficial to everyone if the instructor is informed and clear about what is entailed in this job. There are basic skills and responsibilities that coordinators perform in their role and there also are more nuanced details and relationships that are developed with experience.

It is up to the individual instructor and coordinator to together agree on a way to hold classes, so clear communication between the two is key. It is the instructor's responsibility to hold space energetically for the class. It is the coordinator's responsibility to tend to the details. The instructor relies on the coordinator to provide insight into their own community.

Skills and Responsibilities of the Coordinator

<u>The preliminary planning for a class includes:</u>
Looking at class date options in advance to avoid conflicts such as holidays, significant events in the community, and SOBI conference dates. Communicate with other coordinators in that area to avoid class date and content conflicts.

Communicating with an instructor about class content, possible dates, financial budget and agreements including teacher/coordinator fee structure and minimums, agreement about the coordinator's free attendance in the class, expenses, lodging and transportation options, availability for sessions/tutorials with students and for a lecture demonstration, etc.

Finding a class space/location. Checking on availability for specific dates, rental rates, reservation and refund policies, or the specifics of a more informal arrangement like someone's office or house. Considerations include the size and convenience of a location, parking, how tables and chairs will be provided, room lighting, room temperature control, restroom and restaurant accessibility, etc.

Estimating the budget – calculating the estimated net income by subtracting projected expenses from an estimated gross income. How many students are needed in order to meet the bottom line of the budget?

If you are just starting to coordinate classes in a community, reach out to some potential students to gauge interest.

The next step includes:
Communicating with the instructor about preliminary findings and agreeing to move forward. Agreement on tuition rates, early bird deadline, refund policy, what happens if the class cancels, etc.

Reserving the space which includes entering an agreement/contract with the space provider and possibly paying a deposit.

Creating promotional literature including info provided by the instructor – class description(s), instructor biographical paragraph, class prerequisite, and credits provided. The instructor reviews the promotional info before it is made public. The appropriate trademark statements are in place. Include any request to the students such a bringing tables, sheets, pillows, etc. The coordinator sends out the promo via email lists, social media posts, the SOBI website, community bulletin boards, etc. If the instructor or coordinator can present a lecture demonstration before the class, organize that.

Reserving lodging for the instructor, whether booking a hotel room or a homestay. If the host of the homestay is a class student, be clear on the agreement. Most instructors trade class tuition for lodging.

Registering students for the class including receiving and recording payment, confirming their registration in writing with the refund policy stated, and fielding their questions. Refer any appropriate questions to the instructor directly or indirectly, depending on the instructor's preference.

Communicating with the instructor when enough students have registered to meet the financial bottom line. The coordinator arranges for any transportation that the instructor needs, i.e., an airplane ticket, train ticket, or perhaps the instructor prefers to do this themselves.

Setting up session/tutorial appointments for students with the instructor unless the instructor prefers to book their own. Reserving a space for this and agreeing on the coordinator's compensation for this service.

Keeping all expense receipts and collecting any from the instructor for reimbursement.

Communicating with class participants as the class date approaches regarding considerations for the space, directions, reminders about tables, sheets, snack and beverages, how to dress, etc.

Communicating with the instructor about who will make photocopies of the handout materials, blank certificates, and evaluation forms. Some instructors prefer to make their own and bring them with them, while others prefer to email the documents and have the coordinator make the copies.

Providing the instructor with an updated list of class participants.

Responsibilities during the class:
Opening the space prior to the beginning of class and leaving on time with it clean and in an orderly condition.

Bring all paperwork and photocopies. At the beginning of class, give the instructor the blank certificates in order to be filled in and signed by the end of class.

Providing water and possibly other snacks and beverages for class participants.

Making sure tables, sheets, pillows have been provided.

Paying the balance of the space rental.

Collecting all receipts from the instructor.

Follow up includes:
Finalizing the financial worksheet itemizing the gross income, the expenses, and the net income.

Paying the instructor and reimbursing them for their expenses by the agreed upon time. Some instructors prefer to be paid on the same day of the class. Paying the coordinator and reimbursing for expenses.

Communicating with the students about upcoming classes.

The Role of the Class Coordinator

Luann Overmyer, Advanced Instructor

1. Inform students and prospects about classes, lecture demos and availability for sessions. Make and distribute flyer.

2. Arrange for housing for the Instructor, and possibly transportation.

3. Find suitable space for class and reserve the space.

4. Track student names, contact info and payments.

5. Track fees and expenses.
   a. Collect deposits and fees for class, noting the name, date and amount each student has paid.
   b. Track expenses and keep receipts.

6. Communicate with the Instructor regarding their needs and wants prior to the class.

7. Clarify financial agreement with the Instructor ahead of time. This includes expenditures, deposits, and cancellation or refund policy. It also includes the split of expenditures in case of cancellation, expenses covered, and percentage split.

8. Go over finances with Instructor during time together.

9. Energetically: Allow energy and communication to flow positively. Be direct, positive, clean and clear. Don't "try." If you build it, they will come.

Notes and Advice from Experienced Coordinators

Luann Overmyer, Advanced Instructor

Preparing to Schedule a Class

- Contact instructors to check their availability
- Check with students in the area to see what they need
- Check on any big events in the area that may raise the rates of hotel rooms and flights
- Check with other coordinators in the area (within 2 hours' drive) and check the SOBI website to make sure you are not having the same class or classes on the same weekend
- Check on instructor minimums, needs, etc.
- Confirm if the instructor wants to do sessions and tutorials, and if so on what days, how much time they want in between sessions, how many they want to do in a day, and how much they charge for a session

What to Look For in an Instructor

Look for passion for the work, passion for helping grow our local Ortho-Bionomy community, organization, passion to teach the principles, and ease. The instructors who travel generally enjoy teaching and being with the students and family. Most instructors either currently coordinate or have done so, so there is mutual

respect. Our goal as coordinators can be to create an environment that allows the instructor the flexibility they need for their personality and teaching style. They know having a small class is not necessarily a failure on the part of the coordinator, it is what it is. And that is much appreciated. We have instructors that really support our community, and it is beautiful. Sometimes they are willing to teach a class knowing it will not be big, but that it is supportive of the local community. This is a partnership and getting the opportunity to spend time outside of class with the fabulous people that come to teach is one of our benefits as a coordinator.

Setting Up a Class

One possibility is to have a website with the classes and descriptions, create a flyer and handle the finances, copies, space, set up, tear down, and on-site issues. The website could accept PayPal so people can pay via credit card. It could also have a list of local lodging and restaurants.

Send out an email confirmation to all registrants with the details of class, day, start times, what to bring, available session times, lodging and restaurants. Make sure you have a phone number listed so people can reach you on class day in case they need to contact you for any reason, e.g. they are lost. Make sure you have your phone on and nearby the day of the class.

Tracking Documents

Use an Excel spreadsheet of the expenses and income that automatically shows the net income.

Keep a detailed list of all the tasks, including the dates you send the email class announcements, phone calls to students, instructor contact, etc. It could also include the flights times, when you need to leave for the airport, phone number to check on flight arrival time, and times sessions have been booked.

Preparing for Instructors

If you have pets and plan for the instructor to be at your home at some point, check to see if the instructor has any allergies. Some coordinators provide instructors transportation to class, to and from the airport, and lunch. Access to a computer, private bathroom, or wireless for those that bring their own computer is appreciated by instructors. Give them privacy and the option to choose to spend time with you or have time to themselves.

Determine if you will be cooking meals, or whether they prefer to eat out. If you are preparing meals, find out any food allergies or preferences beforehand, whether they eat breakfast and how much time they need to prepare in the morning before leaving for class. Show them where dishes are kept, extra towels, blankets and pillows, and offer them the use of the laundry room if needed. Provide a map of the town, or general directions to the bank, grocery store, post office, gas stations and park.

It is nice to check in and see if there is any bodywork or support the instructor needs when they get in. Many instructors do not get the opportunity to get bodywork outside of a feedback/eval session, so it is nice to be able to support them when they do not have to be in “instructor mode.” Try to follow the instructor’s lead on conversation at dinner and down time. It is important that they have time to not be in instructor mode, so try to not bring up “business” during downtime unless they bring up questions or follow on for the next day.

Preparing for the Class

A plastic tub with necessities is an easy way to gather items for the class. Sweeteners, stir sticks, cups, napkins or paper towels, box of tissue and an extra roll of toilet paper are good to have. Also extra pens, a roll of tape, name tags, all the paperwork (handouts, sign in sheet, surveys, receipts, extra paper) and any visual aids to be used at the class. Coffee (& filters), tea and a coffee pot as well as water or whatever snacks you are providing

can be added at the last minute. It's helpful to have as much of this prepared before the instructor arrives as possible. This gives them some down time for themselves before they teach.

Agreements Between Coordinators and Instructors

Ursula Hofer, Advanced Instructor

Clear agreements and clear communication between the Coordinator and the Instructor are most important to me. What the coordinator does in their area and the relationship between the Instructor and the Coordinator are a big part of setting the tone for the class. Agreements should be fair to both the Coordinator and the Instructor.

Setting up a Class

Different Coordinators have different levels of experience on how to set up classes. Some people have never done it before and part of the process to set up a class is learning how to do it. If the Coordinator doesn't have any experience I see it as part of my task to help them learn the process of organizing an Ortho-Bionomy class. This can involve:

1. Discussion of frequency and timing of classes for that area
2. Ideas for the flyer
3. Possible demos and other contacts to introduce Ortho-Bionomy to the community
4. How to work with other coordinators in the area
5. What other Instructors could be brought into the same area
6. What we need in a classroom
7. Deposits
8. Deadlines
9. Sending out directions for class
10. For people from out of town: hotel information, directions, etc.
11. Organizing enough tables with sheets, pillows, etc.
12. Organizing housing for the Instructor
13. Organizing transportation for the Instructor to and from the airport
14. Setting up private sessions before and after the class

Coordinator's Tasks During the Class

Another factor is the different tasks, which need to be attended to while the class is happening:

1. Collecting and keeping track of money
2. Writing receipts
3. Providing water and possibly other refreshments (e.g. teas, snacks) for the participants
4. Letting the students know if they need to bring their own snacks or if they will be provided
5. Anything else participants need to know to make this a positive experience (possibly second pair of socks or slippers, etc.)

The Coordinator's Fee

The coordination fee includes free attendance of the class plus some specified percentage of the income after all expenses have been deducted (ranging from 0-30%). (This doesn't include the private sessions I do before and after the class). The percentage is based on:

1. The amount of experience the coordinator has
2. The commitment of hours she is willing to make
3. If the class minimum is met
4. If housing and transportation for the Instructor are provided

For the maximum percentage split I expect the coordinator to handle everything: space reservation, client scheduling, flyer distribution, accommodation arrangements, housing, transportation to/from airport and classes, troubleshooting for the class.

All expenses get deducted first. This includes the cost for production and distribution of the flyer, space rental, Instructor transportation, snacks at the class (if provided), approximate cost of phone calls, etc. Afterwards, if the agreed upon minimum fee for the Instructor is covered, the net income is split on the agreed upon percentage.

This shows that there can't be one arrangement with everybody, but that there needs to be a clear arrangement with each Coordinator.

I have a minimum fee for a weekend. I ask the Coordinator to have a deadline for registration two weeks before the class, so the Instructor can make their plane reservation and can plan their private practice. In my experience, it is really important to put the flyer out early (about two months prior to the class), so people can plan their schedules and their money around the class.

I have personally organized classes for Ortho-Bionomy for 13 years. At the beginning it was learning how to make contacts, how to reach out, but then also how to do my best and then let it happen. To me organizing an Ortho-Bionomy Class is another opportunity to apply the principles of Ortho-Bionomy and watch them work so well.

Coordinator Documents

Sign-In Sheet
Word doc
Excel spreadsheet
Numbers sheet (Mac)

Class Roster
Excel spreadsheet

Financial Packet
Includes automated calculations for minimum student requirements, payment tracking, and payouts to the Instructor and Coordinator.
Excel spreadsheet

Financial Worksheet
Sheila Kroll, Advanced Instructor
Word doc

Class Contract Template
Word doc

Coordinator Checklist
Word doc

Certificate Template
Included in instructor evolvement documents. For coordinators who are not instructors, if the instructor would like you to fill out student certificates, please ask the instructor to send you the certificate template.

The SOBI office keeps a master list of all classes and attendees for transcription and training purposes. If you used the Word doc sign-in sheet or a document of your own, after the class ends please fill out the Class Roster spreadsheet and send it to the SOBI office at office@ortho-bionomy.org
If you used the Excel spreadsheet linked above you may simply send that completed form to the office in place of the Class Roster.
If you used the Numbers sheet linked above, first export the completed form as an Excel document the send it to the office in place of the Class Roster.

Other Helpful Documents

You may find the following documents helpful in coordinating classes. All of the documents are downloadable through the links below and are also available on the SOBI website in the *Members Only* section under *Member Resources / Coordinator Resources.*

The Art of Coordinating
Erin Long, Instructor
PDF

Possible Flyer/Poster/Social Post Information
Word doc