

*We are excited about the training/speaking work that we do – about the exciting changes that it brings about in the personal and professional lives of participants and attendees – about the important improvements it can bring to the experiences of their clients and customers – and about the improved outcomes that it can bring to organizations. We are always excited by the opportunities that we are given to bring this work to new audiences. We hope that we will have the opportunity to work with you. We will do everything that we can to make your event truly outstanding and memorable.*

*We also wish to make your business dealings with us as “smooth” and friendly as possible. In this context, we have developed this Information Sheet – to answer as many questions as possible from the start. Please DO NOT HESITATE to ask for clarification on any of the following material.*

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## Expenses Likely To Be Incurred

### Trainer/Speaker Fees

Fees are quoted at a daily rate and full daily fees are payable – even for a partial-day engagement. (Otherwise Trainers would necessarily accept only full-day assignments.) Fees do not include travel expenses, handout materials or any applicable taxes.

### Travel Expenses

- **Expense Projections:** Shortly after a customer contacts us, we will prepare provide them with a “ball park” estimate of travel expenses. These are projections only, based on our past experience. (Actual prices will vary according to local hotel rates/taxes, car rental rates, etc.) Once a customer confirms a booking, we will prepare a Working Agreement that includes a more precise projection of all anticipated expenses. We provide these for the customer’s budgeting purposes only – actual expenses may be slightly higher or lower. Should the amount of actual expenses exceed our projections by more than 10%, we will charge the customer only 50% of the amount in excess of that.
- **Hotel Accommodation:** We will likely ask your assistance in locating a suitable hotel for the Speaker/Presenter. Generally, we look for hotels that are of decent quality, as close as possible to the event venue, and that have room service available. Typically, accommodation will be required the evening before the event through to and including the evening following the event. (i.e. 3 nights of accommodation for a 2-day event.) In most cases, we book rooms and pay hotel bills directly; but customers can elect to make the reservations and/or have room charges billed directly to them.
- **Ground Transportation:** Any ground transportation (taxi, rental car, shuttle, etc.) from the airport to the hotel and/or to the event will be charged. The

- mode of transportation will be selected according to convenience and cost-benefit. Where the Trainer's personal vehicle is used, a mileage charges will be based on the current rate in use by the IRS (for U.S. travel) or CRA (for Canadian travel).
- **Airfare:** Because there can be schedule/event changes along the way, we typically don't book flights until 2-4 weeks prior to travel. Airfare prices are extremely volatile and are difficult to predict in advance. We do our very best to get the lowest reasonable prices we can. Typically, we will initially quote an "outside" price on airfare – and charge only actual costs once they are finalized. Often several events are combined in one trip and we split airfare costs between our customers<sup>1</sup> - usually resulting in a savings to both parties.
  - **Baggage:** Because of new air carrier practices, luggage handling fees are an additional expense.
  - **Meals & Incidentals:** An allowance of \$50/day will be assessed for meals, incidentals, airport parking, etc. Typically this rate will be assessed for the full days of any event plus one additional day to cover travel time. (i.e. 3 days allowance for a 2-day event.)
  - **Receipts:** Customers will be provided with receipts for all major expenses – e.g. Airfare, lodging and car rental. No other receipts will typically be provided. (Customers may request full accounting and receipts for all expenses, but they must request this in writing at least one month prior to the event and they will be assessed an additional administrative fee<sup>2</sup>.)

## Materials

In most cases, participants and/or audience members will require handout materials. Depending on the particular seminar or keynote, this could be actual texts or photocopied handout packages. If texts are required, we will make them available at prices significantly below retail ones. If photocopied handouts are required, the originals will be provided to the customer – to be duplicated for each attendee. Please note that these are copyrighted materials and are typically not to be made available, in any format, to persons outside of the immediate attendee group.

## Equipment

The customer is required to provide the required audio/visual equipment. Typically, we will require an **LCD/PowerPoint projector** and a PA system with **cordless lavalier (lapel-type) microphone**. (Please note: When specified, a

<sup>1</sup> If the cost of airfare is to be split between two or more customers, we typically determine what the actual round trip cost from the originating city would be to each of the participating locations and use those numbers to proportionately allocate the actual flight fare. For instance if a flight included customers in both Madison, WI and Los Angeles, CA and a regular round trip to Madison would be \$300 and to Los Angeles, \$200 - we would allocate 2/5 of the actual fare to the Los Angeles customer - and 3/5 to the Madison customer.

<sup>2</sup> Customers who require full accounting and receipts will be charged an additional \$75 administrative charge. Please note that we are also happy to add projected amounts for Meals and Incidentals to the Training fee - making that fee inclusive of all meals and incidentals.

cordless lavalier microphone is an absolutely critical requirement!) We will bring our own laptop computer but may need assistance in connecting it properly to your projector and/or sound system. (It is always a good idea to have an additional laptop there for back-up.)

## Booking, Cancellations and Financial Commitments

### Booking Dates

Where it is avoidable, we prefer not to book events on Wednesdays. Trainers are frequently booked in two locations each week – necessitating Wednesday as a “travel” day. (Exceptions can be made when necessary.)

### Tentative Booking

We encourage prospective customers to have us “tentatively” hold dates for training events. This can be done at no obligation to the customer; but it gives them “first right of acceptance” should someone else want to book those dates. (i.e. We will continue to market the Trainer/Speaker for those dates; but, should someone else request them, the original customer will have the first opportunity to make a firm confirmation of commitment.)

### Confirmation of Booking

To confirm a booking, customers will typically be required to pay a non-refundable “deposit” equal to 25% of the projected training fees.

### Cancellation

Should the customer cancel 60 days or more prior to the event, they will be responsible for 25% of the projected training fee. Should the Customer cancel 30 - 60 days prior to the event, they will be liable for 50% of the projected training fee plus any non-refundable expenses incurred to-date (non-refundable airfare, etc.). Should the Customer cancel 1 - 30 days prior to the event they will be liable for 100% of the fees and any non-refundable expenses incurred to-date.<sup>3</sup>

## Payment Schedule

- 25% of Trainer/Speaker fees are due and payable upon confirmation of the Customer’s intent to engage the Trainer/Speaker.
- Typically, we will invoice our customers within 1 week after the event concludes for the balance of training fees, travel expenses and/or materials purchased. Invoices are payable upon receipt.

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<sup>3</sup> If we are able to re-book the Trainer/Speaker for the originally-confirmed dates, the customer will only be liable for the non-refundable deposit and any non-refundable expenses incurred. (Note: Our ability to re-book a speaker is extremely difficult without at least a 90-day lead time.)

## Other Considerations

### **Full-Day Seminars**

Typical one-day seminars are designed to be delivered in 6 – 6.5 hours of instructional time.

### **Room Requirements**

Some training events, for the sake of the presenter and participants, require specific spatial and or seating arrangements. These will be specified in the Working Agreement.

### **Limits to Registration**

Some training seminars lose quality if the number of participants exceeds a certain threshold. In such cases, we may specify the maximum number of participants for a particular event.

### **Audio/Video Recording**

Without exception, no audio or video recording of presentations is permitted without written permission.

## Working Agreement

As verbal agreement is reached, Diversity World will prepare a preliminary written Working Agreement. This document will help to ensure that both parties have the same understanding of commitments and expectations. This Agreement will be updated and refined as negotiations continue and additional details are settled.

*We look forward to working with you!*