Evaluation of Social Interaction Skills (ESI)
International Course Hosting Guidelines
(Registrations Administered by Course Host)

The CIOTS team hopes you find these guidelines helpful and informative.   This document is meant to give you a solid overview of our course hosting expectations. We strive to hold high quality and well-organized courses. Thank you for collaborating with us to deliver world class Occupational Therapy continuing education. If you have any questions, please do write or call us.

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CIOTS
CENTER FOR INNOVATIVE OT SOLUTIONS

Determine the cost of hosting a course

1) **Teaching Faculty** – You will need to take in enough money in registrations to pay the teaching faculty an <u>honorarium</u>, <u>travel</u>, <u>meals</u>, and <u>accommodation expenses</u> from their home to the course site and back.

   1 – 40 participants: One faculty
   More than 40 participants: Contact us

   Honorarium – Expect to pay honorarium to the faculty on the last day of the course.

If the course is held within a faculty's "world region" or intracontinental region (North America, Australasia, Europe, South America, Africa):	If the course location requires faculty to travel intercontinentally:
North American faculty: $2500 (USD) All other faculty: €2000 (Euro)	North American faculty: $3000 (USD) or €2500 (Euro), whichever is greater at the time of the course All other faculty: €2500 (Euro)

2) **Material Costs paid to CIOTS** – You will need to take in enough money in registrations to pay the following material costs for each participant. CIOTS will invoice you via email within 2 weeks of the end of the course. Please pay in USD via bank wire transfer or a check drawn in USD on a US bank with the 9-digit US routing number. Invoices are due in 30 days.

ESI manual:	$ 75
Shipping:	20
OTAP software 3 yr.:	165
Calibration fee:	265
Per person in USD	**$525**

Classroom Specifications

As you consider hosting a course, ensuring that the classroom meets our guidelines is critical. The classroom must have tables and comfortable chairs for the participants and faculty. Excellent, dimmable lighting, reliable high-speed internet connection for streaming video in the classroom, and superior audio-visual equipment is imperative. Planning in regard to a healthy mid-morning and mid-afternoon nutrition break, as well as providing information regarding the location of parking and restrooms are appreciated by everyone. Specific details are as follows:

Classroom lighting:

Ambient and overhead lighting must be controlled by the faculty and capable of being dimmed sufficiently during LCD projection to ensure both the quality of the video and the ability of participants to take notes.

Break snacks and drinks location:

In order to provide a quiet environment for participants when scoring cases, breaks and other related activities must occur outside of the classroom. (See the ESI Course Handouts for full course schedule and break times).

Restrooms:

Restroom facilities need to be clean and readily available.

Parking (if applicable):

Adequate parking, including parking for those with disabilities, will need to be arranged. If needed, parking permits should be provided either before the course or on the first day at registration.
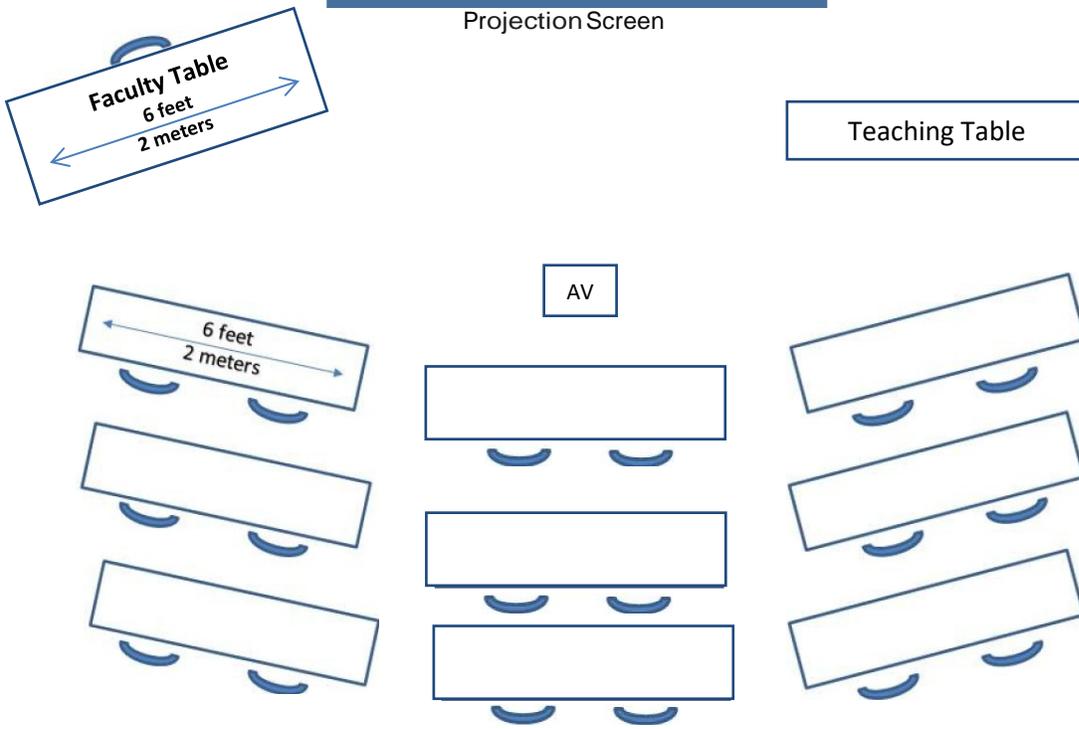
Internet connection:

Reliable high-speed internet connection for streaming video in the classroom is required. Ensure that faculty and the local course coordinator will have access to the internet in the classroom during the course.

Arrangement of room:

A private, quiet room large enough to seat the participants using tables and chairs is required. The participants must be seated at tables or similar surfaces large enough to hold open two large notebooks or binders and other pieces of paper. Recommended seating allowances are to allow one meter of table space per participant. The chairs must be comfortable and preferably moveable. Be sure there is enough space between rows so that the faculty may move about the room and speak with seated participants individually. Folding chairs or metal seats are not acceptable.

One large table (2 meters) and a chair for the faculty will need to be placed at the front of the room, facing the participants. The faculty cannot be sitting in front of the projection screen. In addition, a large table will be needed at the front, facing the participants for teaching and demonstrations. Another smaller table will be needed for audio visual equipment.

It is best if the room is square in shape. Long, narrow rooms are not acceptable as it is difficult to see the video projection. The best layout is to have the rows laid out at an angle, or as shown in the figure on the next page:

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Projection Screen

Faculty Table
6 feet
2 meters

Teaching Table

AV

6 feet
2 meters

Audio Visual Specifications

High quality audio visual equipment is a very important component of teaching a course. High quality LCD projection is vital. Plan to arrive approximately 1 hour early each day to arrange the room furniture, test all equipment, and to assist faculty with any technical needs they may have. Please contact each faculty to ensure you will have available correct connections for laptop computers, projection and sound system equipment.

Test all equipment for compatibility 1 week and the day prior to the course. You must ensure, before Day 1 of the course, that a sharp, clear, and bright image is projected from the LCD projector onto the screen. The lights must not be turned off when using the projector.

PLEASE TEST EQUIPMENT AND BE SURE IT WORKS EACH DAY.

Audio Visual Requirements
Bright LCD projector with system inputs and cables for a laptop computer. It must be controlled easily by the faculty from the front of the classroom.
Large screen for projection. The projected image needs to be large enough that those in the back of the room can see clearly the videos and slides as they are being projected. Additionally, the image on the screen must be projected high enough so that the participants in the back of the room can see the bottom of the slides over the heads of those seated front of them.
Sound: external speakers and microphone. The external speakers can be connected to the laptop via a *single pin input jack*, but the sound may not be loud enough to be heard from the back of the room. You may need amplified speakers loud enough for larger courses.
Extension cords and cables for all equipment.
A computer that includes the special characters, if needed, of any non-English language (e.g., å, æ, ü, ø) and internet connection. The computer needs to be located in an area where the participants have ready access and can enter their information before the course day starts or during breaks for our database course registration process and in order to get their software information.
Reliable high-speed internet connection in the classroom.
Check with each faculty to determine if a laptop needs to be provided for their use during the course. The laptop must be newer, able to work with LCD technology, have a modern version of Microsoft Office (PowerPoint, Word, Excel) and a USB port.

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On-site Support and Course Preparation

While the majority of the preparation is done before the course, we do require daily, limited, on-site support. Having someone who is not attending the course readily available to assist the faculty and manage the day-to-day needs of a course is vital.

Highlighters and name tags

Each participant will need a yellow highlighter and name tag. The person's first name should be written in large letters that are easy to read.

Live case

On the last day of ESI courses, participants will need to observe a "live" case social interaction. Preferably, the teaching faculty will be involved in the final selection of the "live" case. However, it will be important that you identify potential "live" case people who meet the criteria before the course begins.

- Two or three persons are needed to come in for about 30 minutes to engage in a social interaction in front of the participants. The live observation takes place after lunch on Day 3. The faculty who teaches the course will inform you of when and where the volunteers should come once the faculty has seen the course classroom.

  Typically, the faculty will not meet the volunteers who come before the live observation begins. Someone who is not a course participant, therefore, may need to be available to meet the volunteers when they arrive and inform them of when and how to enter the classroom. The final plan will be determined by the faculty teaching the course.

- The volunteers can be colleagues (well adults), even other occupational therapists. They cannot be a course participant, or someone who is trained in the ESI.

  Well adults actually work well, as it is much easier than bringing in persons who have social interaction difficulties who may not feel comfortable interacting in front of a large group of people.

- When appropriate, please give each person a thank you card, and a small gift or cash (about $20 USD).

Lunches and Breaks

The *ESI Course Handouts* contain a schedule which indicates the length of lunch breaks, 1 hour. These lunch breaks are designed to allow a participant to go and get lunch (40 minutes) and have time to complete items discussed in the previous course session (20 minutes). Please do not shorten the length of lunch breaks. Although food for lunches is not typically provided, you may decide to do so at your own expense. If you plan to provide or schedule a group lunch, please ensure that the total lunch time (including travel, if applicable) does not exceed 40 minutes.

The schedule contained in the *ESI Course Handouts* also indicates the length and timing of other short breaks (20 minutes each).

Arrange for a light, plentiful, and healthful snack to be served at each short break. Hot and cold beverages such as tea, coffee, juice, and carbonated drinks, as well as water should be available. The faculty is often busy working with course participants during break times and may not have the opportunity to take a break. Please be attentive to their needs.

The *ESI Course Handouts* may be found on the Center for Innovative OT Solutions website www.innovativeOTsolutions.com. Click Courses, Materials, and select **ESI** from the drop-down menu. Click Download. A zip file containing all handouts will be downloaded. The schedule may be found in the PDF file called "esiCourseHandouts").

Pre-course preparation by participants

Inform each participant to complete the required reading and print the necessary course handouts prior to the first day of the course. Detailed instructions and all course handouts may be found on the Center for Innovative OT Solutions website www.innovativeOTsolutions.com. Click Courses, Materials, and select **ESI** from the drop-down menu. Detailed instructions are found at the bottom of the web page. Click the Download button to download a zip file containing all handouts. Instruct each participant to bring the course handouts with them to the course. In order to ensure that they have the most recent version, advise them to print the handouts and score forms no sooner than 10 days prior to the first day of the course.

Ordering and distributing manuals and software

About 30 days prior to the start of the course, CIOTS will contact the course host to obtain the final participant count. At that time, CIOTS will order the shipment of the manuals required for the course. The shipping costs for a bulk shipment are much less than one or two manuals. Please plan carefully. Let us know if you need more time to finalize the participant list. If you receive a late registration after CIOTS has ordered the manuals shipment, please contact us to see if there is time to ship more manuals. Depending on the timing, expedited shipping costs may apply. You may need to collect an expedited shipping fee from the late registrant(s).

We will need the following shipping information from you:
First and last name
Company or University name if applicable
Address, City, State/Province
Postal code and Country
Phone and e-mail contact for shipping purposes

The manuals will be shipped to the address you provide, and all fees, taxes, and insurance will be prepaid by us. We will then invoice you for the actual shipping cost, along with the rest of the course materials, just after the course is completed. The shipments normally take about **7 to 15 business days to arrive**. Please provide your email address to receive shipment tracking notifications. We do recommend that you allow enough time to receive the manuals.

Software licenses can only be distributed to those participants who attend a course. Participants will register with our system called the CORe on Day 1 of the course. They will then be sent their 3-year ESI OTAP software license and installation instructions to the email address they provide.

Teaching and demonstration materials

Materials and supplies will be needed by the faculty for teaching demonstration purposes. Each of these items will be needed on a daily basis.   When possible, keep these items in the classroom after each day so that they are readily available the following day. If they must be removed from the classroom, please have them available no later than 8:00 a.m.

Teaching materials (All 3 days)

Large white dry erase board and several fresh different colored dry erase markers.
If no dry erase board is available, a flip chart with several fresh different colored
markers.

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Supplies for the live case (Day 3)

a. Two decks of playing cards
b. Four or five magazines with colored pictures from which pictures or text can be
   cut out – a variety of topics suitable for men and women is desirable
c. Scissors (2 pair)
d. Marking pens (fine) -- several different colors d. Glue stick or glue
e. 5 to 10 sheets of white paper (letter or A4 size)
f. 3 or 4 sheets of colored paper (different colors, letter or A4 size)
g. Two pens
h. Two pencils (with erasers)

Advertising

We rely on our course hosts to advertise the course locally. We can list the course on our website at no cost with a link to your registration site if you wish.

We are happy to provide high quality graphic logos, and you are encouraged to use the information from our website in your written materials to advertise the course.

ESI overview may be found on our website www.innovativeotsolutions.com by clicking on Tools and then ESI.

ESI course objectives and rater calibration information here may be found on our website www.innovativeotsolutions.com by clicking on Courses and then Objectives (scroll to the bottom of the web page).

Recommended Course Planning Schedule and Checklist

The following is a recommended course planning schedule. It is intended to serve as a general guideline to facilitate your planning.

9+ months before the course begins

1. Schedule a course 9+ months in advance.
2. Determine a host site and reserve a room. (Be sure the room is available for the course schedule found in the *Course Handouts.* (The *ESI Course Handouts* are found on the Center for Innovative OT Solutions website www.innovativeOTsolutions.com. Click Courses, Materials, and select **ESI** from the drop-down menu. Click Download. A zip file containing all handouts will be downloaded. The schedule can be found in the PDF file called "esiCourseHandouts".
3. Begin to advertise.
4. Make financial arrangements - budget and establish a course fee amount based on cost of services and materials (software, manual, calibration fee, shipping charges, postage, miscellaneous materials, copying fees, travel expenses for faculty, honoraria, AV rental fees, catering, host facility charges, etc.).
5. Create a registration form and develop a registration procedure. Establish a registration deadline no later than 30 days prior to the first day of the course (Please note: Course participants must attend the full 5 days of the course to be eligible to attempt to calibrate.).
6. You will need to provide CIOTS with the Course Location (including if possible a website link for the venue), Financial information for billing purposes, Shipping information, and Registration information including registration pricing. You may also want to provide website links and or information regarding parking, accommodations, driving directions, maps, and other visitor information. CIOTS will post the course on our website.

3 to 4 months before the course begins

1. Continue advertising, if needed.
2. Plan for snacks and drinks for each break time (does **not** have to be expensive catering).
3. Reserve audio visual equipment.
4. Monitor registrations.
5. Discuss payment arrangements for honorarium, travel, and accommodations with faculty.

30 days or more before the course begins

1. Contact live case participant(s) and plan for observation.
2. Order course manuals by letting the CIOTS staff know the number of participants and the shipping information.
3. CIOTS will introduce you to the faculty who will teach the course. Contact faculty and make final arrangements for payment of honorarium, accommodations, and travel. Faculty may contact you for local hotel or transportation information.

15 to 30 days before the course begins

Participants *must* complete the required reading and print the handouts prior to the first day of the course. Please inform course participants that detailed instructions and all course handouts may be found on the Center for Innovative OT Solutions website www.innovativeOTsolutions.com. Click Courses, Materials, and select **ESI** from the drop-down menu. Detailed instructions are found at the bottom of the web page. Click the Download button to download a zip file containing all handouts. Instruct each participant to bring the course handouts with them to the course. In order to ensure that they have the most recent version, advise them to print the handouts and score forms no sooner than 10 days prior to the first day of the course.

One week prior to the first day of the course

1. Finalize the snacks and drinks schedule.
2. Check audio visual equipment arrangements.
3. Make final arrangements for teaching demonstration materials and supplies.
4. Create name tags and provide highlighter for each participant.
5. Finalize faculty travel, accommodations, and any specific requests.

During the week of each course

Software will be distributed to each participant via email using the information each participant provides Day 1 in the CORe (our online database).

International Contact Information

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