

Our Expectations... it's how we like to do business

OUR BIG IDEA

Founded in 2017, we provide Inclusion and Belonging consultancy services to businesses and organisations in the UK, Europe and globally. Joanne Lockwood is "The Inclusive Culture Expert".

WHAT YOU CAN EXPECT FROM US

We are a specialist service and expect to be treated fairly and paid on time. We work based on trust and collaboration and expect you to do the same. We will provide you with a proposal which will set out:

- The Services we will be providing and our delivery methods (see 'How We Deliver our Expertise' and 'What Do We Mean By...' which explain what we mean);
- The Fees which you will pay as below plus travel time and expenses (see 'Paying Fees, Travel & Expenses for more on this), as well as any proposed or agreed timescales; and
- Any goals and objectives that are relevant to our Services.

To help us deliver at our best, and understand your role, please read 'The Tech Basics'.

THE ESSENTIALS

Payment Terms

Please pay in advance by bank transfer to secure your booking. We like any remaining fees and expenses paid within 14 days of delivery unless our proposal says otherwise. **We don't accept cheques.** If you have a complex purchase approval process, please speak to us so we can complete it before we deliver our services.

Intellectual Property & Copyright

What we provide – our content, materials and delivery style – reflects our intellectual property. We ask you to ensure you and your audience/delegates do not record or broadcast it (including internal re-use, training or archive purposes) without our *explicit* consent. Unless we agree, no single clip longer than 30 seconds can be shared on social media.

Cancellations

We can charge our full Fees (plus any pre-booked expenses) if you cancel less than 28 days before the event or our first agreed delivery, and 50% if you cancel between 28 and 56 days beforehand. We may credit those fees towards a future event, at our discretion.

Marketing and Promotion

We would love you to promote the event and will happily provide our headshots and bio. We are proud of working for you so want to use images/photos or testimonials for our own marketing purposes on social media, with your prior agreement.

Social Media

We would love your audience/delegates to post photos, short quotes and up to 30 seconds of video or audio bites during the event, adding any event hashtags and #SEEChangeHappen, @jo_lockwood1965, @seechangehappen.

HOW WE DELIVER OUR EXPERTISE

Our Standards

We will use all our skill, care and expertise in carrying out the Services to meet your goals and objectives. We will comply with all relevant legislation (including on data protection) and all your instructions relating to the event or the Services.

We will keep secret any business-sensitive information that is shared with us.

What Terms Mean

In Person: Any session where the speaker and audience/delegates go to a physical location (in real life), whether a conference centre, customer premise or a specially-hired facility.

Live Stream/Webinar: A live session over the internet using a platform such as YouTube, Facebook, LinkedIn etc and not wholly pre-recorded. Audience interaction is generally limited to asynchronous Q&A, online quizzes, or post-event follow-up.

Remote Speaking: A session – such as a keynote, a panel discussion, or lunch & learn – using an interactive online event platform. This may be either pre-recorded or live, and may include Q&A and limited audience interaction.

Remote Training: A session – such as a workshop – using an internet platform with speaker and the audience/delegates sharing their voice/video and interacting with the speaker and each other. Audience interaction may include break out groups, full group discussions, facilitated activities etc.

Online Delivery Platforms

Our standard delivery method uses Zoom or MS Teams for meetings, remote speaking, remote training, and live streams/webinars. We can host sessions of up to 500 on Zoom and 100 on MS Teams.

Other internet delivery platforms include Adobe Connect, GotoMeeting, GotoWebinar, Hopin, ON24, etc. We often use interactive platforms such as Mentimeter, AhaSlides, Google Jamboard, Docs and Sheets. Each platform has its own specific terminology, feature set and access methods.

We will do our best to accommodate any requests for alternative delivery methods. Please note that some of our content may not be suitable with your chosen platform due to its limitations e.g. breakout rooms.

Restrictions on Replays

Where we deliver a session (streamed, remote, or at a conference) you must not record it. If you want other audiences or extra delegates to view our content, you **must agree** this in advance so we can price for it accordingly.

WHAT DO WE MEAN BY...

Conference

an externally focused event that you organise or host for an audience or delegates (your customers, members or community). You may or may not charge people to attend.

At a conference, we may deliver a bespoke keynote or workshop for your audience/ delegates with agreed take-aways and messages. We also deliver a Q&A, a panel discussion, audience interaction or training/workshop. We can MC/Emcee an event or part of an event if required.

Training/Workshop

an internal event made up of your staff, volunteers, cohort, or stakeholders. Interactive and may utilise facilitation, breakouts, video, and quizzes with Q&A.

We will deliver content from our menu of standard products, delivered “as is” and incorporating your own language and terms.

Panel Discussion

either standalone or as part of another event, where we are part of an expert group taking planned or unplanned questions from the audience/delegates and the panel host or both.

We can act as the panel host or facilitator if required.

Lunch & Learn

an internally-focused or members event with a bespoke element, which may contain some audience interaction with quizzes or a Q&A.

We can tailor the session for your audience/ delegates with agreed take-aways and messages. We would deliver this as a mini-keynote, seminar or breakfast briefing.

Consultancy

providing expertise in the form of one-to-one engagements, reviewing documents, writing blogs/articles, mentoring, coaching, taking part in webinars, or online video calls.

THE TECH BASICS

We will provide these items to enhance our delivery:

- **AV Equipment:** We prefer to use our own laptop and slide clicker where possible, which uses an HDMI output. We can also work with VGA plus audio.
- **Presentation & Slides:** As standard, our slides are formatted as 16:9 (1920x1080/HD widescreen). We can accommodate 4:3 (800x600 XGA) if we agree this in advance. We may charge extra to convert formats or use alternate templates.
- If we supply our slides to you, then they will be in Microsoft PowerPoint (pptx) format together with a pdf version.
- **Hard Copy Materials:** pdf copies of our slides and other materials for distribution to your audience/delegates if our proposal states.



Restrictions on Use

You must not share or publish our presentations in MS PowerPoint– please use the pdf version for this purpose.

You must not resell, amend, incorporate, edit, or post online for public view any other materials that we provide without our prior permission.

You will provide these items to enhance our delivery:

- **AV Equipment:** a projector & screen or TV monitor suitable for the room and audience.
- For larger audiences or conference rooms, a lapel or headset microphone and Public Address System. For keynotes, a presenter-view monitor and, where possible, a countdown timer. We can explain these items if needed.
- **Multimedia:** audio capability as well as visuals (we can provide our own Bluetooth speaker if necessary for training and workshops).
- **Interactive Content:** a reliable on-stage internet connection (for example for audience/delegate interaction via a mobile device/phone using on-line platforms such as Ahaslides, Mentimeter, Kahoot! or Slido, or interaction using an 'on-screen' QR code).

Online Events

You will provide licenses for any alternative delivery platforms such as Google Meet, Adobe Connect (ie other than Zoom or MS Teams).

WHAT ELSE YOU NEED TO KNOW...

Resources for training/workshops

You will provide:

- marker pens, sharpies, flipcharts & whiteboards
- the room laid out so delegates can form groups of 3 or 4 for activities.
- ballpoint pens, and post-it pads in various colours
- colour-printed copies of our materials for delegates.

Preparing for the event

You will promptly respond to our requests for information to help us meet your goals. We strongly advise that we schedule a 'discovery call' with you ahead of any event to explore your goals further and reflect your values and vision as an organisation.

For live streaming or remote training, we recommend an online run-through of content, topics and details so we understand your expectations and can meet them. Where requested, we will screen-share slide decks and walk-through sessions or activities.

For conferences, lunch & learn or panel discussions, if you would like on-site rehearsals or run-throughs you need to **tell us in advance** as it is not included as standard in our proposal.

Improving Accessibility

You must ask your audience/delegates about and notify us of any accessibility or assistance requirements that they require to make the most of our sessions. In turn, we will let you know anything to ensure our own needs are catered for.

Improving our Service

We can provide an audience/delegate feedback form. We would love to obtain or receive written or video testimonials and feedback to share on social media or on our website with your prior agreement.

Changing our Agreement

If you ask us to make any changes to our proposal or these terms, including the dates for delivery, we will confirm those changes and any extra Fees or expenses by email. Rescheduling may not incur a Fee if it is more than 28 days before the event.

If we cannot attend an event or provide consultancy services at the agreed time due to unexpected circumstances such as illness, transport problems or government restrictions we will let you know and reschedule, where possible.

Online Connection Issues

We recognise that the internet and any connecting platforms are not perfect.

There are times when failures and outages occur. We will work with you to reschedule or workaround the issues the best we can, regardless of where the problem may lie – we hope that you will show the same understanding.

PAYING FEES, TRAVEL AND EXPENSES

Fees

Payments must be net of any transaction fees, exchange rate conversion or commission in GBP (£).

Currency

We conduct our business in GBP (£) with UK-based banks. If needed, we can accept other international currencies (eg Euro, USD, AUD etc).

Although we prefer direct bank transfers, we can accept cash or card payments (although will charge you any processing fees from our merchant service provider).

We do not accept or process cheques or cryptocurrency.

Accommodation

Where our proposal requests (due to location or start/finish times or both), you will need to organise overnight accommodation & meals before/after your event.

Please choose safe hotel accommodation close to the venue, preferably the main event hotel, to Premier Inn or 3* standard.

Meals and Refreshments

We will charge you or you will arrange all meals (breakfast, lunch and dinner), as well as hot and cold soft drinks both during travel and at the event.

Transfers

Please organise transfers to/from airports, train stations or hotels, preferably pre-booked.

Travel Time

We charge travel time **on top of our Fees** in portions of half-day units. Our proposal will set out our travel time rates.

Travel Costs

Where possible, you will prebook any flights, parking and transfers once we confirm any necessary arrangements.

Air Travel: Where you arrange flights, you will book at least premium economy for international air travel over 2 hours, and business class where it is over 3 hours. You will also include checked-in hold luggage, seat reservations, and (where applicable) speedy boarding.

Travel by Car: We charge car mileage at 50p/mile together with any parking costs, road tolls, car ferries, congestion charges or other expenses. Alternatively, we charge taxi fares at cost.

Public Transport: We will use public transport where possible. For journey times greater than 2 hours (or where seating is in limited supply) this will be charged at first or premium class.

UNDERSTANDING MORE ABOUT US

Business Name

We are a limited company registered in England under the name of SEE Change Happen Ltd, Company Registration Number: 13138905

Business Addresses

Correspondence and Trading Address: 7 Covert Grove, Waterlooville, PO7 8EY

Registered Address: 1 The Briars, Waterberry Drive, Waterlooville, PO7 7YH

Social Media

You can contact us on social media or via email at info@seechangehappen.co.uk our website <https://seechangehappen.co.uk> or joannelockwood.co.uk.

Our Twitter/Instagram handles are @seechangehappen or @jo_lockwood1965

Concessions and Discounts

We are open to conversations with not-for-profit or public sector organisations to discuss our fee structure. We are a commercial organisation and as such are not able to work for free – we always insist on travel expenses to be covered.

Risks

We hold Professional Indemnity and Public Liability insurance cover – please ask us for details. If you require changes to our cover, we may charge you for any additional premium.

Our total liability under our agreement with you is limited to the sum stated in our proposal – except for claims arising from death, personal injury or fraud. You will bring any legal claims within 2 years of us completing our Services.

Complaints

If you are not happy with our service, please tell us as soon as possible and before posting publicly about it. We will do all that we can to put things right but can't make it better if you don't tell us.

If we end up falling out, then we prefer to resolve any issues amicably. If not, any dispute will be subject to English law and conducted in English in the English courts.

Ending this Agreement

Where there is a serious breach of this agreement, either of us may bring it to an end by letting to other have 30 days' warning. If either of us become insolvent, the other may bring this agreement to an end immediately.