

# **Guide to Hosting a Statewide Military Kids and Family Summit**

DRAFT

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## Purpose of the Statewide Summit

There are many good reasons to hold a statewide awareness and information/resource sharing Summit. The purpose of the Summit should be clearly established before the planning process begins. Generally, a Summit is initiated through the following steps:

- 1) A common mission among interested parties is determined
- 2) A planning committee is appointed.
- 3) A Summit chair is selected or appointed.

Before proceeding any further, the need for and purpose of the Summit must be determined. The Summit Planning Committee can be a valuable asset in guiding and advising the sponsor(s) on establishing the purpose of the Summit. Remember, your planning committee is a broad representation of the many community partners interested in serving Military Families; don't underestimate the committee's value or abilities.

Following are tips to guide you in developing a statement of the Summit's purpose:

- **Establish a clear and emphatic purpose.** Some Summits fail simply because their purpose was not fully addressed. What does success look like to the planning committee?
- **Know what is happening in the area of Military Families around the state, region and nation.** For example, if your Summit will address a specific issue, find out what your state's Military Community and other states are doing in terms of training and education.
- **Learn the needs of your target audience, volunteers.** Don't tell your target audience what information and training they need--let them tell you. Surveys are helpful to determine need. Surveys usually will reveal what training, education, and the exchange of information are high priorities with volunteers. Your challenge is to research the matter a little deeper to identify what topics are in demand and what systems are already in place to provide training and education. Then do an honest assessment. Is there a need for additional training and educational programs? Can you identify gaps in the current system? If so, you have identified the need for and purpose of your program.

## **Considerations as you begin planning**

### **Number of Participants**

Some statewide Summit planners believe that a large number of participants ensure a better Summit; this is not necessarily true. The number of attendees coincides with other factors. Consider the following:

### **Target audience**

Don't plan on a statewide Summit of 500 when your pool of expected attendees numbers only 200. Once you have a track record you can base your expected attendance on the average attendance at past Summits.

### **Summit budget**

The financial resources available to spend on the statewide Summit will directly affect your program and may also affect the number of invited participants.

### **Number of meeting rooms and room capacities**

The number of available meeting rooms can limit the number of concurrent workshops you hold. Total seating capacity limits the number of participants you can invite.

**Facility accommodations** If the statewide Summit is more than one day the number of sleeping rooms and facility capacity are extremely important.

### **Size of large meeting ballroom space or banquet facility**

When workshops, meals, or other general sessions are part of your program, the number of participants is again limited by large gathering room capacity.

### **Summit Dates**

Statewide Summit planners should consider a timetable of at least 2 years to thoroughly organize a Summit. This should provide all the time you will need to handle the planning and administrative tasks. Of course, these tasks can usually be accomplished in much less time, but the earlier you start, the easier your job will be. Some Summit planners regard date and location as the most critical elements; others are most concerned with price and ease of travel to the location. Before you contact convention bureaus or meeting facilities with your request for bids, establish first, second, and third date preferences. When you are identifying preferred dates, some thought should be given to:

- Dates of other events competing for your target audience.
- National and religious holidays and events.
- Expected weather conditions.
- Dates of school openings and closings.
- Peak convention seasons.

These factors have an impact on statewide Summit attendance by staff, speakers, and attendees. They also may affect the facility rates you are quoted and the ability to negotiate certain items at reduced rates.

# Statewide Summit Planning Committee

Planning, organizing and conducting a Summit can be both rewarding and challenging at times. To develop a successful Summit, you must employ the talents, cooperation, coordination, and participation of many individuals. For this reason, it is best to establish a Summit Planning Committee very early in the planning process.

The committee description follows:

Military Kids and Families Summit Planning Committee Members (list various organizations):  
Function: Plan and implement a statewide education and awareness Summit on the issues and needs of Military Youth and Families for professionals and volunteers currently working with Military Kids and their Families.

The committee chair(s) in cooperation with the National Guard Family Programs, Reserve contacts and representatives of active duty installations, State Department of Education, youth serving organizations (4-H, Boys and Girls Clubs, YMCA's etc.), , Veteran Service organizations (American Legion and Auxiliary, VFW, etc.), Mental Health Agencies, Medical Community, etc. selects the members of the planning committee who will chair subcommittees for carrying out major tasks related to conducting the Summit.

## Duties and Responsibilities of Summit Planning Committee Chair(s)

- Begin planning 15 months or more in advance of dates
- Recruit volunteer for planning committee
- Call and chair planning committee meetings, develop agenda, review progress, guide implementation
- Name an executive committee (chairs of major tasks and functions)
- Coordinate the planning and delegation of responsibility for development of program, speakers, assemblies, meals and other activities
- Prepare invitation for registration flyer
- Write pre & post Summit articles for "4-H Leaders' Corner" and other relevant publications
- Receive reports, delegate additional responsibilities
- Assist with development of budget
- Assist with overall evaluation and post-Summit report (October)
- Planning committee may consist of more than committee chairs--to give opportunity for maximum input of ideas and suggestions

## **Organizing the Statewide Summit Planning Committee**

A statewide Summit Planning Committee is a group of people that holds some responsibility for shaping the Summit and planning the program. Committee members should broadly represent your target audience and have an honest desire to work together in the interest of reaching a common group goal. There is no one formula for success, so other arrangements are possible. A committee should be used to distribute the workload among many people, but the greatest benefit of using a committee is that it ensures that the Summit represents the thinking and planning of more than one individual.

Small Summits have small planning committees; larger Summits may need larger committees because there are more decisions to be made and there is more work to be done. Be careful--forming large committees can sometimes lead to problems. Getting everyone together for meetings is the most obvious difficulty. Getting everyone to agree on issues can be more serious. Certainly, situations will occur where complete agreement cannot be attained. The point here is not to create problems by assembling a committee that is so large that reaching agreement is difficult.

Look for persons to serve on your committee who:

- Are qualified to serve due to their experience in working with youth, families and the military, or their organizational, negotiation, or communication skills.
- Are dependable.
- Are able to accept responsibility.
- Work well with others.
- Can make decisions.
- Can abide by the decision of the majority.
- Demonstrate clear passion and enthusiasm to reach the final goal

Once you begin to deal with various issues, the committee's role will become more defined. The key to avoiding confusion or misunderstandings is to clearly explain to committee members the committee's purpose and function. On different issues the committee may be asked to advise or make recommendations, give its stamp of approval, or make a final decision.

There are other committee issues that need to be addressed, such as:

- Will committee members be reimbursed for meeting expenses?
- Will youth serve on the committee?
- How often will the committee meet?
- How long will the committee exist?
- Will the committee evaluate the Summit?
- Will the work of the committee be recorded for future use?
- To whom is the committee responsible?

The answers to these questions are especially important when the committee consists of representatives from the various entities in both civilian and military communities.

# Statewide SUMMIT PLANNING TIMELINE

A clearly outlined timeline is one of the most important documents needed for planning a successful Summit. Timelines will vary depending on the scope and site of your Summit. Other considerations when developing a timeline are deadlines that are directly related to Summit activities and events. The timeline should be created by (if possible) and shared with all planning committee members. The following timeline is a guide, but should be changed to reflect any specific time requirements at the Summit location.

## TIME IN ADVANCE ACTIVITY

### 2 years out

- Select site and statewide Summit chair/co-chairs
- Begin recruiting for Summit committee and subcommittee chairs
- Choose a Summit theme and design a logo
- Begin program planning
- Select/secure Summit meeting/sleeping facilities (if needed)

### 12 months

- Review policies regarding State Leaders Summit (Kevin . . . Not sure what you mean by this)
- Begin budget planning (secure prices on tour buses, equipment rental, printing, meeting facilities, etc.)
- Contact keynote speakers

### 10 - 12 months

- Make arrangements for tours, exhibits
- Secure specific meeting spaces/rooms
- Do preliminary publicity/invitation so interested attendees can “save the date”

### 6- 10 months

- Create and present request for workshop proposals
- Select workshops and contact presenters
- Finalize overall Summit program
- Maintain regular contacts with site, committee chairs, other sponsors

### 3 - 6 months

- Finalize specific meeting rooms
- Have registration and Summit information printed
- Publicize program in Leader’s Corner newsletters and 4-H web site; encourage planning partners to do the same in relevant ways (newsletters, websites, listservs, etc.)
- Bulk mail and/or email Summit information

### 2 -3 months

- Send presenters/exhibitors written confirmation of the Summit
- Finalize exact order/times of programs
- Contact presenters/exhibitors regarding equipment & special needs

### **1 - 2 months**

- Invite special guests
- Print registration packet information, programs, etc.
- Purchase/make registration packet supplies

### **6 weeks**

- Finalize list of needed equipment, special materials

### **4 weeks**

- Assign Summit workers specific duties
- Contact news media for publicity
- Registration due

### **3 - 4 weeks**

- Finalize renting of equipment (if necessary)

### **2 - 4 weeks**

- Finalize order/procedures for events such as plenary sessions and banquets.

### **2 weeks**

- Contact keynote and other speakers for any final details
- Prepare registration packets
- Test equipment

### **1 - 6 days**

- Finalize numbers for meals

### **Day of the Summit**

- Set up equipment, specific room arrangements

### **Follow-Up Activities**

#### **Time Afterward Activity**

### **1 - 6 days**

- Return rented/borrowed equipment and materials

### **1 - 2 weeks**

- Send written thank-you's to presenters and helpers

### **1 - 4 weeks**

- Compile and share evaluation results with planning committee
- Pay bills

### **1 - 2 months**

- Prepare final report/recommendations
- Celebrate with Planning Committee

# Facilities and Site Selection

## Give Yourself Time

Another important decision you will need to make early in the Summit planning process is site selection. **Early** is a key word here. The more time you have to choose a site, the greater your options will be. The more options you have, the greater your ability to obtain preferred dates and negotiate with facilities and meeting facilities will be.

How early should you start scouting Summit sites? That depends on the size of the Summit and the number of facilities available to accommodate you in the locale you desire. In terms of site selection, 18 months before the proposed date is not too early to start the selection process, especially if you want a site during its peak season or there are few options available for adequate facilities. The competition for choice meeting dates gets stiffer every year. Some facilities in cities are booking 4 to 6 years out. Smart planners start early!!

## Matching the Summit with a Facility

Matching your Summit with the right type of facility can make a good Summit a great Summit. This requires some considerate planning. For example, if you are planning a lot of "free time," especially in the evening, you would not want to use a Summit center that is located far away from restaurants and local attractions. You need to consider what type of facility can best serve your needs. Following is a list of facility types and the advantages of using each:

A **downtown facility** in a large city with downtown attractions is a good choice when attendees are in meetings most of the day but have large blocks of personal time around lunch or in the evening.

An **airport facility** or **airport meeting facility** works great when you have conferees flying in for a one- or two-day Summit and you need to keep ground travel time at a minimum.

**Resort properties** often have excellent Summit facilities. Resort properties can provide great bargains during off-season or shoulder periods.

**Convention centers** are often used for very large Summits at which conferees may be sleeping at several facilities, none of which can accommodate meeting and/or banquet needs.

Any of these types of facilities can help make your Summit a success if it is a good match for your meeting. When you know your audience, understand the purpose of your Summit, and have planned an appropriate Summit program, choosing the proper type of facility will be easy.

## Summit History Data and Fact Sheets

Summits can bring great economic benefits to the host city or community. For this reason, you will find convention bureaus, facility, resorts, and convention centers aggressively competing for your Summit business. In determining the value of your business, Convention Bureaus and Summit property representatives may want to see a well-documented record of your past Summit. These documents are valuable site selection tools. With this information, you can accurately anticipate your current meeting needs and also establish a dollar value for your Summit business, positioning yourself for contract negotiations that eventually will follow.

The information you provide in your Summit history data routinely will be verified with the facilities used in the past, so provide accurate information and don't exaggerate your business value. The data you present should cover the three most recent years. Although additional information may be necessary, convention bureaus, facilities, and meeting facilities will want to see the following Summit history data:

- Summit dates and locations.
- Number of sleeping rooms and suites blocked at each facility.
- Number of single and double occupancies.
- Number of rooms picked up (include pre-Summit and post-Summit dates).
- Number of no-shows (does not include timely made cancellations).
- Number of hospitality suites used.
- Number of meeting rooms used each day and number of participants in each room.
- Types of functions held each day.
- Food and beverage information (guaranteed and consumed).
- Arrival and departure patterns.
- Activities planned away from Summit site (sports, tours, dinners, receptions, etc.).

This list illustrates why good record keeping is a vital element of Summit planning. When examined in conjunction with the Summit profile, this information can provide a solid foundation on which to base decisions about your upcoming meeting. You will be asked to provide this information to future Summit committees.

With the data on past meetings as a guideline, draw up a fact sheet of anticipated meeting requirements. The fact sheet should include:

- Preferred Summit dates (first, second, and third choices).
- Number of sleeping rooms needed (include suites and any requirements for multiple occupancy).
- Meeting room requirements (number, size, and duration of use).
- Food and beverage requirements.
- Audience profile (volunteers, teens, extension staff, invited guests, etc.)
- How facilities should submit bids (include contact person, agency, address, and phone and fax numbers).
- When decisions will be reached (indicate whether site visits are required).
- Summit history data.

Fact sheets are incredible time savers; without them, you can spend hours on the phone reciting the same information to different convention bureaus and facility sales representatives. There are two easy ways to distribute your fact sheets.

1. You can mail fact sheets directly to each facility and/or meeting facility. This method works well only if you already know which facilities can accommodate your needs. Otherwise, you will be wasting energy on facilities that cannot compete for your business.

2. You can contact the CVB's in the locales you are considering. Ask the CVB's to send your fact sheet and your **request for bids** to only those facilities that fit your needs.

## **Convention and Visitors Bureaus**

CVB's (convention and visitors bureaus) vary in size and services, and the only way to know what services are available is to contact each CVB and see what it offers. CVB's can be a great resource. All the information you need about the city or region under consideration can be obtained through the local CVB. If you need information about facilities and meeting facilities, airline services, public safety, restaurants, attractions, nightlife, and other available activities, the CVB can obtain this information for you. Commonly, the CVB will provide a packet of information that answers Summit planners' most frequently asked questions and, at the same time, highlights the features of its area of service.

If you have some flexibility in determining which city will receive your Summit business, contact several CVB's for their packets of facts and information. Perceptions of a city or geographic area are sometimes very different from actualities. The only way you can make an informed decision on the best location for your Summit is to compare geographic areas, cities, facilities, and meeting facilities; the CVB's will help you do that. Another benefit of contacting two or more CVB's is that you may discover you have some excellent options in terms of location, and it's never too early to start thinking about your next Summit.

It is advisable to call your CVB representative in advance to determine the best way to seek bids. Review your Summit history data and fact sheet with the representative, who will let you know what other information is needed. In many cases the representative will contact facilities and meeting facilities for you. Additionally, many bureaus will help schedule **site inspections** for you at the properties you want to see.

Remember, the CVB is your liaison to businesses, local officials, and the community. It can be a valuable partner in Summit planning and execution.

## **Site Inspections**

A vital step in the site selection process is a visit to each property under consideration. This may be done by members of the Summit Planning Committee, the chair, or both. If site inspections are the responsibility of only the chair, another person who understands the objectives of the Summit and the meeting requirements should be included for inspections. A second viewpoint is always helpful.

Too often a Summit site is chosen without the involvement of the Summit Chair. Sometimes this cannot be avoided, but considering the importance of the meeting location, site inspection should involve the chair whenever possible. After the initial Summit plans are made, the execution of those plans will be the responsibility of the Summit Chair. Plans and site inspections made by a committee without the involvement of the chair can unnecessarily complicate the Summit planning process.

Additionally, site inspections can build the relationship and open communication between the chair and the staff of the facility or meeting facility. Keeping the chair involved from the start of dialogue with facility staff also increases the likelihood that the meeting as planned will work at the facility, and decreases the likelihood of miscommunication or misunderstandings.

Site inspections offer the opportunity to walk through a property and examine it for cleanliness and upkeep, but there is so much more that can be accomplished. This is your chance to meet the property managers, see the staff in action, and get a feel for the ambiance of the facility. You will want to measure those special qualities that cannot be shown on floor plans or brochures. Are rooms bright or dim, noisy or quiet, warm or cold, fresh smelling or musty? Are staff polite, friendly, well-groomed and courteous? Can you move easily and comfortably from room to room? These are the kinds of characteristics that can be measured only by a site inspection.

As you begin your tour of a property, you can expect to receive a packet from your sales representative containing details such as room capacities; the number of singles, doubles, and suites; the property's floor plan; and banquet options and menus. In addition to this useful information, prepare your own checklist of items you want to review and questions you need to have answered. Then, as you walk through a property, check off each item or take notes on what you observe and what has been discussed with staff from the facility or meeting center.

This checklist and written record becomes very important when several sites are visited. It may seem easy to remember the differences between properties at first, but the collected data can be overwhelming.

Stays focused on the purpose of your visit, and fully utilize the short time you have at the property with its representative. Observe, take notes, and above all, ask questions! There are no stupid questions and chances are good that what you ask has been asked before.

### **Negotiating Agreements and Contracts**

In the past, arrangements with facilities for sleeping rooms and meeting rooms were very often informal. In some places, they are still. The more common practice, however, is to have a formal agreement between the facility and the client; these are known as **letters of agreement** or **facility contracts**.

Many organizations do not allow their employees to enter into contracts, commitments, and agreements without administrative approval. The Planning committee should choose one organization to be the fiscal agent and sign all contracts.

The Summit chair and facilities chair would begin negotiations with the facility and receive in writing the proposed contract from the facility. Negotiations frequently involve a series of inquiries and conversations between the facility and the client before an agreement can be reached. This process may take several days or several weeks. The bottom line in negotiating is that the facility needs to make a profit on your business and, at the same time, you need to pay a reasonable price for the services you are buying. Comparative shopping will help.

What is negotiable? Everything--but you must negotiate from a position of knowledge.

- Know what you want to buy.
- Know what a competitive price for what you want is.
- Know what your budget will permit.

Keep in mind, too, that negotiations should be viewed as a collaborative effort among professionals. Neither party should regard their relationship with the other as adversarial. The

relationship you develop with the facility representative may be the most important one when it comes to having the Summit run smoothly!

## Definitions

Some commonly used terms you should know are:

- **Room block.** The number and type of rooms the facility will hold in reserve for a client.
- **Room pickup.** The number of rooms actually used by the client
- **Breakouts.** Commonly used to refer to the number of rooms used for concurrent meeting sessions.
- **Rack rates.** The facility's official posted rates for sleeping rooms. What people usually pay coming off the street. You want to be sure that your facility rate is less than the rack rate.
- **Group rates.** Also known as **net rates**, refers to discounted room prices given to clients responsible for bringing in large pieces of business.
- **Flat rate.** Refers to a single group rate for sleeping rooms for all of your business. This rate may not include suites.
- **Sliding scale of group rates.** Discounted sleeping rooms based on the type of guest rooms (single, double, twin, etc.) that will be used.
- **Food and Beverage.** Includes breakfast, refreshments (includes coffee, tea, hot chocolate, juices, soft drinks, danish and pastries, yogurt, pudding, snacks, etc.), lunch, receptions and buffets, banquets, cash bars, and generally anything ordered from a menu. You will be given a minimum amount to spend on Food and Beverage. Usually, this will not include gratuity and tax.

## Function Information

A **function information sheet** or **function space assignment sheet** will indicate a facility's understanding of your meeting requirements. Facilities can only guarantee space for what you agree to, so be sure all your meeting requirements are addressed.

Meeting **room rental charges** are negotiable. Charges, if any, should be spelled out in the original agreement. Specify room setup charges, if any, or charges to reset meeting rooms.

**Complimentary space** and **setup** details are important to specify in the agreement to avoid any unexpected charges for room use or setups requested by the group. Complimentary pads, pencils, water, candy dishes, microphones, easels, blackboards, etc., should be included here. Any complimentary items should be noted in the contract. Be sure to find out if AV equipment can be brought in to the facility. This will help cut your costs when using equipment from Committee member offices. If there are costs for equipment, you will want to consider charging for higher priced items such as computers and multi-media projectors and large screens. These items can be quite costly.

The agreement should specify all **Summit services** provided by the facility for which there is a cost to the group, i.e., electricians, security, exhibit table setups, resetting rooms, faxes, etc.

The facility's **sign policy** specifies what is and is not permitted and should be noted in the agreement. Usually facilities permit an easel or a special sign holder outside each function room and directional signs at stairways, elevators, and in the lobby.

A reassignment of **function space** provision should state that the facility shall not reassign any function space committed to the group without the group's prior approval.

**Final programs** reflecting expected attendance figures and functions are required by facilities, usually two to six months in advance of the meeting date. Thereafter, facilities may release space not committed to use by the group after a notice of intent to release space is provided to the group.

### **Exhibit Requirements**

The Summit may provide some type of exhibits and displays. Summits in the past have included local and statewide commercial exhibitors. If you decide to provide an exhibit space, consider the following tips.

**Assigned exhibit space.** Include location and any limits on size, weight, types, or number of exhibits. It's an advantage to have an exhibit area in which food is served or sold, and to have open space between your exhibit and registration area and that of other facility patrons.

**Charges for exhibit space.** Exhibit space may be complimentary; it's negotiable.

**Setup and dismantle dates.** Indicate the times your group will have access to the space for setup and the date and time for dismantling exhibits. Clearly state the times the exhibit areas may be open and when the area needs to be cleared.

**Utilities available.** Include what's available (electricity, lighting, gas, compressed air, water, drains, etc.) and any charges or limitations.

**Storage and security.** Include arrangements for storage, storage limitations, access to storage area, and security arrangements.

**Materials.** Include specifications for who is responsible for getting materials to the exhibit space.

### **Pre-Summit Shipping**

Frequently it is necessary to ship materials to the Summit site in advance of the meeting. Your agreement should specify how materials should be packed and marked, to whom materials should be sent, and that such materials will be stored in a secured location.

### **Food and Beverage**

**Specific functions** should be listed, such as the number of breakfasts, lunches, dinners, coffee breaks, cocktail receptions, etc., that you plan to hold; the day and date for each function; and the estimated attendance for each function. Facility policies will determine how many days in advance the group must give a minimum guarantee of the number of people who will attend each function. Facilities usually set for up to five percent over the guaranteed

minimum; the specific percentage as directed by the group should be included in the agreement.

**Confirmed prices** for all catered meals should be listed. At the minimum, a cap could be put on all food and beverage prices and exact charges could be provided to the group at an acceptable time in advance of the Summit (three to nine months).

State the **date** by which the group must **specify choice** of menus, beverages, etc., and confirmed prices.

**Gratuities or service charges** required for all food and beverage should be stated.

**Federal, State, and local taxes** should be clearly stated.

**Donated Food** Items should be cleared with the facility. Most facilities do not allow for food to be brought into meeting rooms due to liability concerns. However, food items can be donated to the food and beverage services to help cut food costs. Most facilities charge a service fee up to ½ the usual facility charge item. Therefore, some food donations may not be worth the effort of coordination of delivery, working with the donor, etc. when compared to the small amount the donation will cut from the food and beverage budget.

### **Americans with Disabilities Act Compliance**

Facilities in the United States and its territories are required under the Americans With Disabilities Act (ADA) to make their facilities and services accessible to persons with disabilities. The agreement should state that the facility shall comply with all public accommodations of the ADA, including TTY for facility reservations.

### **Post-Summit Report**

The facility should agree to provide the group with a Summit report before a certain date after the Summit. The report should include room pickup; the number of singles/doubles, no shows, and cancellations; and food and beverage activity, including room service, restaurant usage, banquet functions, and other food and beverage functions.

### **Cancellation Policy**

All agreements should carry a cancellation policy for the protection of both parties. The following are suggested elements of a cancellation policy:

### **Rights to Cancellation.**

**Generally.** The agreement will bind each party, and there shall be no right of termination or right to cancel obligations under this agreement except as otherwise provided herein.

**Uncontrollable events.** The performance of this agreement by either party is subject to acts of God, war, government regulation, disaster, strikes, civil disorder, curtailment of transportation facilities, or other emergency making it inadvisable, illegal, or impossible to perform their obligations under this agreement. Either party may cancel this agreement for any one or more of such reasons upon written notice to the other party.

**One-year advance notice.** The group may cancel this agreement without liability provided written notice of cancellation is given to the facility on or before (*date one year in advance of Summit*).

**Construction/renovation. Be sure to ask if the facility is planning any future construction.** In the event that the facility will be undergoing any construction or renovation during the Summit, the facility shall promptly notify the group, and the group shall have the right to cancel this agreement without liability upon written notice to the facility if, in the group's reasonable judgment, such construction or renovation may unreasonably affect the use of the facilities or the quality of service to be provided under this agreement.

**Management changes.**

Option 1: The facility shall promptly notify the group if there is a change in facility management prior to the Summit, and the group shall have the right to cancel this agreement without liability upon written notice to the facility.

Option 2: Neither change of ownership of the facility nor change of leadership of the group relieves either party of the responsibilities or obligations of this agreement.

**Cancellation Fee.** Be sure that you know if there are cancellation fees. Most facilities include cancellation fees in the contract agreement.

**Failure by the facility.** Failure by the facility to provide the space and/or services as agreed shall render the facility liable to the group for all direct, indirect, and consequential damages, expenses, attorney fees, and costs incurred by the group on account of such failure. This is an important item to include in any agreement with the Summit facility.

# PLANNING THE PROGRAM

In planning the Summit program, you can create an almost infinite number of possible designs. This is an important process because even high-quality sessions can lose their value if the program is not properly planned. The program planning process should begin after the following steps have been completed:

- The Summit purpose has been defined.
- The planning committee has been appointed and job descriptions provided.
- The date and site has been determined.
- The number of participants has been estimated.

Your mission here is to design the best combination of events, presentation methods, and scheduling to serve your Summit. Although many combinations may be wrong for your Summit, there is not one right program; many different programs will work well. Your program should not be set so rigidly that it does not allow some flexibility.

**Event Registration.** All Summits need a registration period even if all conferees are preregistered. Attendees must still check in, pick up Summit materials, and receive Summit information.

**Orientation.** Many Summits schedule an orientation session for new comers. The orientation permits conferees to learn more about the Summit or its sponsors and can also make first-time attendees feel welcomed.

**Opening Session.** Most Summits have an opening session, which may feature a keynote speaker. A keynote speaker, if one is invited, should energize and set the tone for the remainder of the Summit or at least for the day. Other speakers may be used instead of or with the keynote speaker, such as an officer or local member of the sponsoring association or local officials. Ceremonies, award presentations, musical groups, film presentations, or other exciting events may be part of the opening session. The energy level of your group will be extremely high at this time. All opening sessions should include a welcome address.

**General Sessions.** General sessions are also known as **plenary sessions**--gatherings of all the conferees together. These sessions may include food functions, opening and closing sessions, entertainment sessions, business sessions, or sessions to discuss topics of interest to all conferees.

**Follow-up sessions.** These sessions provide additional time for a small group to discuss topics presented at a previous session and should include the presenter or speaker from the first session.

**Concurrent Sessions.** When two or more sessions are held at the same time they are known as concurrent sessions. Various presentation methods can be used in concurrent sessions, some of which are described in the next section. Keep in mind the room capacity and how available rooms when you plan how many sessions to offer at any one time. Just because you have plenty of rooms don't schedule more sessions than needed. Although you may want to provide many session options, keep in mind that workshop presenters have put a lot of work into their session and prefer to have a decent attendance. Remember, it is better to have a few very good workshop options and happy attendees and presenters rather than many workshops and unhappy attendees and presenters!

**Breaks.** In between consecutive sessions you should schedule a break. Breaks may be as short as ten minutes and last as long as thirty minutes. When soft drinks or snacks are available, it should be designated as a **refreshment break**. Breaks tell your conferees that there is a schedule, and, to help them keep that schedule, you have planned time for restroom visits, traveling, stretching, etc.

**Workshop.** This is a group assembled to discuss a common issue, problem, or interest. Frequently, "workshop" is used to refer to a concurrent breakout session.

**Closing Session.** Summits that end without a closing session send conferees away feeling a little empty. Closing sessions should uplift conferees and send them away feeling informed, renewed, and energized. Ceremonies, special videos, entertainment, reports from work group sessions, or presentations made by convention bureau representatives from the site of next year's Summit work well also.

**Banquets.** For purposes of this section, banquets include plenary breakfasts, luncheons, dinners, or other food functions at which all conferees will gather together. These functions should have a purpose. Consider the following possible purposes:

- To offer fellowship, nourishment, and nothing more.
- To set the mood for the following event.
- To relax the group after a particularly taxing session or day.
- To make awards, presentations, or announcements.
- To provide entertainment.
- To present guest speakers.
- To offer a transitional period to bridge two segments of the Summit.

**Receptions.** Receptions can vary greatly in their degrees of formality. They provide a period for people to talk and to meet each other and the association's officers or local officials. Receptions can be used to entertain, to keep attendees from wandering, or to prepare for an upcoming event. These events are particularly helpful in providing networking time for large Summits.

**Tours/field trips.** These trips are usually scheduled for entertainment purposes or to provide a convenient way of visiting local attractions. However, you may schedule a trip as part of Summit business. For example, a tour of a model facility could be planned, followed by or preceded by a session at the Summit site to discuss the tour.

**Free time.** Free time is simply any break period of more than thirty minutes when conferees have time to do what they want. Free time allows conferees to take care of business matters, attend exhibits, purchase Summit items, shop, check out, or simply prepare for a special part of the Summit program.

# Scheduling

There are certain things you can do in terms of scheduling that will help produce a better Summit. Most are a matter of common sense when you consider the impact of your scheduling decisions. But don't get overly concerned if the optimum schedule is not one of your options; sometimes certain scheduling options are unavailable. Here are some tips on effective scheduling.

**Tip 1: When overnight accommodations are required, schedule registration periods and events after hotel check-in is available and before check-out is required.** When this is not practical, be sure to arrange for safe storage of luggage and schedule free time for check-out.

**Tip 2: Vary events between those with no alternatives and those that offer choices.** Conferees like choices, and choices should be available to accommodate different skill and experience levels.

**Tip 3: Schedule free time.** A Summit day is longer than a normal work day, and sometimes more draining.

**Tip 4: Spread intense sessions.** Follow an intense session with free time or a lighter session.

**Tip 5: Schedule sessions with stimulating presentation methods after lunch.** Energy levels are lowest after lunch; stimulating sessions prevent sluggishness.

**Tip 6: Schedule breaks in between sessions.** This has been mentioned before but is worth mentioning again.

**Tip 7: When conferees are "on their own" for lunch, provide information about restaurants, prices, and service time.** Your conferees will appreciate this and it will help to keep your Summit on schedule.

**Tip 8: Large groups need more time for networking than smaller groups.** Allow for adequate networking time in your schedule so participants can learn from each other and from Summit staff.

# Speakers and Presenters

## Methods for Finding Speakers and Presenters

The term speaker often refers to a person who makes a presentation at a general session. Presenters are persons who make presentations at other sessions, such as concurrent sessions, workshops, and breakouts. For the purpose of this chapter, "speaker" will refer to both types of persons.

Few things can do more damage to a beautifully conceived Summit than inappropriate topics or incompetent speakers. Usually your speaker needs will depend on the topics to be addressed, but sometimes this may get reversed. If a speaker is selected because of his or her reputation for making dynamic presentations and the topic is determined solely by the speaker's preference, this can lead to an unpleasant surprise when the topic is out of sync with the purpose of the Summit and the needs of the attendees.

One way to avoid this problem with speaker topics is to put out a call for proposals. Speakers can then be chosen from respondents. The other method is careful planning by the Summit Planning Committee, the chair, and the sponsor. If the people responsible for the Summit have done their homework, they will know what topics they want to cover, and their job will be narrowed to searching for speakers with expertise on the chosen topics.

## Call for Proposals:

The call for proposals is the best method to use to assure a variety of topics and presenters. Appendix D contains a sample request for proposal form, which can be used for screening prospective speakers. It includes more detail than may be needed for a particular Summit, but all the items on the form are important. You can modify it as necessary.

The request for proposals should be sent to other volunteers and professionals across the state. The Planning Committee members should post the proposal form on their websites and send it out to various email lists.

## Searching for Speakers

Where do you find good speakers? A good place to start is with other meeting planners. Speakers who have done a good job for them could do a good job for you. Planning committee members may also know of good speakers they have heard at other events.

Once you've found prospective speakers, you can contact them without presenting a firm invitation by phone. Tell the prospect about the Summit and that you are considering a session on whatever the topic may be. Give the date and approximate time of the session, if possible, and a description of the audience. Tell the prospect how long the presentation would be if you included the topic in your program. Include information about expenses you will pay for, what honoraria you offer, accommodations, etc. If the prospect is interested and available, neither one of you are locked in at this point. Talk a little longer. Inquire about other presentations he or she has given. If you can identify the Summit chair of these previous presentations, call him or her and ask for opinions. It is usually a good idea to have heard the speaker or know someone who has heard the speaker. Just because a person has a successful career or an unusual experience,

that does not make them a good speaker. The keynote and/or capnote speaker should be one of the highlights of the Summit. Not a disappointment.

When you have made a final choice on which speakers you would like to invite, contact the speaker again. If the speaker agrees to participate in your Summit, follow up with a letter.

The follow-up letter should include:

- Location and address of the Summit.
- Purpose of the Summit.
- Size and general profile of the target audience.
- Topic of the presentation and length of time of the session.
- Layout of the room where the presentation will be given.
- Acceptable attire or dress requirements. Is it a dressy event or a casual event?
- Honorarium and expenses to be paid.
- Details regarding travel, accommodations, and where and when your Summit representative will greet the speaker.
- A deadline for requesting audiovisual aids, if unknown at the time of the invitation, or a confirmation of what will be provided.
- A request for a picture or biographical material, as needed.

Include any promotional material you may have on the Summit and let the speaker know you have put his or her name on the mailing list for future mailings.

Two weeks before the Summit, send the speaker a reminder and include:

- Any program changes that could affect the speaker.
- Any information the speaker might find valuable.
- What accommodations have been arranged.
- Confirmation of where the speaker will be greeted and by whom.
- Your current telephone number, the date you will arrive at the site, and a number at which you can be reached onsite.
- The names of other guests and any appropriate background if the speaker will be seated at the head table.

The search for speakers and the subsequent selection and invitation may be done by anyone who has a role in planning and organizing the Summit. Whatever arrangement works best for you is the one to use. However, some formal control and status record should be the responsibility of one individual. In most cases, this responsibility will fall to the programs chair.

# Executing the Conference Plan

Execution of the conference plan begins with registration and ends with evaluation; in between is the process of conducting the conference. Up to this point, you have been planning and preparing for the conference. Now is the time it all pays off. But beware-- many months of solid planning and preparation can be in vain if they are followed by poor execution.

## Registration

Registration involves an exchange of information, and sometimes money, between the conference sponsor and conferees. It should be a fast, simple, and painless process. This is true for **advance registration** as well as **onsite registration**.

An advance registration form that is complicated, requests information for purposes other than the conference, or is time consuming to complete discourages people from using it. At minimum, it means a lot of time on the phone for you, the secretariat, and prospective participants. At worst, it simply means people won't respond.

Onsite registration leaves a lasting impression. It sets the tone for the rest of the meeting. At a one-day conference, you cannot make up for poor onsite registration.

Here are some precautions that can eliminate registration problems.

## Advance Registration

- Determine and request only the information you need. Don't use registration forms as a survey or to gather information for another project.
- Ask respondents to print answers.
- Avoid using multiple type faces on the form.
- Don't ask questions for which research is necessary to answer.
- Allow respondents to check off or circle answers instead of writing them out.
- Provide one office contact person and phone number to answer questions.
- Record all inquiries and review them with the secretariat.
- Review the registration form with the secretariat and train the secretariat before brochures and registration forms are distributed.
- Provide an incentive for early registration (discounted registration fees, conference mementos, inclusion in conference program book, etc.)
- Indicate "Do Not Send Cash. Make Checks Payable To:"
- If credit cards can be accepted, indicate which ones.
- Give an advance registration cutoff date.
- Indicate what the registration fee will cover--meals, conference materials, tours, etc.
- Specify that checks received will be deposited as soon as possible.
- Confirm registrations with a short letter. Confirm workshops and preregistered activities, list program changes, and provide reminders for ground transportation or hotel check-in.

## Onsite Check-In and Registration

Make a checklist for onsite supplies and equipment.

- Tacks, pins, tape (cellophane and duct)
- Stapler, staples, and staple removers
- Scissors  Glue  Paper clips
- Pens/pencils  Paper
- Receipt forms (in duplicate)
- Blank registration forms
- Typewriter
- Laptop computer
- Calculator
- Extra tickets, blank name badges, ribbons, and programs

- Inspect the registration area. Give yourself time to adjust to the unexpected.
- Check the registration area for proper lighting and ventilation.
- Be sure the registration area creates a flow of traffic. You want people to stop, register, and move on (to coffee, the opening session, etc.).
- Have two registration areas: One for preregistration check-in and one for onsite registration.
- For large groups, create lines within each area--alphabetically or by membership number.
- Make conference check-in/registration one stop. Tickets, name badges, programs, etc., should be preassembled in one packet. Don't send conferees to the next station for tickets, the next station for badges, etc.
- Make directional signs legible and place them well.
- Be prepared if a large number of onsite registrations is expected. Either have clerks obtain information and complete registration cards for conferees, or give registration cards to registrants to complete at another table away from the registration area. Give away pens or have pens tied down at the table.
- Don't skimp on personnel. One registrar for every 100 conferees in the registration area is a minimum ratio; one per 50 is ideal.
- Meet with and train registration clerks prior to registration time. Provide written instructions and responsibilities. Make sure clerks know what information is needed and how to handle problems, press, VIP's, and money.
- Keep a "gofer" in the registration area.
- Establish policy for:
  - Refunds.
  - Lost badges, tickets, programs, etc.
  - "Lost" registrations.
  - Conferees who want to establish a line of credit.
  - Conferees who want their agency billed.
  - Preregistered conferees who still owe money.
  - Walk-ins at a conference closed to walk-in registrations.
  - Handling money and collecting it.

- If computerized registration is used, make sure that at least two registration clerks are familiar with the hardware and software.
- Determine whether registration supplies and equipment need to be securely stored.
- Designate one person to be in charge of registration area.
- Provide information and message centers close to registration area.
- Contact the convention bureau to find out what services or staff they provide.

## Conducting Sessions and Events

### Using Signs

- Place signs at the doors of all workshops listing workshop number (if appropriate), workshop title, name of presenter, and workshop time.
- Place directional signs in lobbies, at end of hallways, and at the top and bottom of staircases; getting lost in a meeting facility is frustrating.
- Designate a person or several people to be in charge of signs.

### Following the Agenda

- Changes to the agenda are sometimes unavoidable. Adjust when you must.
- Stay on schedule even when the agenda has been changed. Make sure monitors, introducers, and the person handling "housekeeping announcements" understand the importance of this.
- When possible, announce changes in the confirmation letter sent to conferees, at general sessions and workshops, and at the information center. Print and distribute flyers if the change warrants it.

### Staffing

During the conference, the chair's time is in great demand. The chair is busy with managing, overseeing, directing, deciding, greeting, meeting, and sometimes peacekeeping. An informed and trained staff of volunteers is necessary for a conference to run smoothly. Learn to delegate conference responsibilities and clearly communicate what needs to be accomplished. Here are some tips to follow:

- All staff should have a thorough knowledge of the conference program and the floor plan of the meeting facility.
- Utilize a staff of **conference guides** to direct traffic flow when necessary and to assist conferees in reaching their next destination. These staff are particularly useful during breaks and when seating a large group for a general session.
- Choose a person to serve as "**session master/mistress**" for each general session. This person should keep the session on schedule, introduce guest speakers, and keep things on a positive note. A speaker should not introduce the next speaker. The session master/mistress should open and close the session and can be seated at the platform or in the audience.
- Delegate **housekeeping announcements** to one person other than the chair or session master.
- Prepare a **briefing book** and provide copies to the sponsor, featured speakers, and "assistant chairs." Briefing books contain event and scheduling details (sometimes confidential in nature). Times and places VIP's will arrive and depart, plus their assigned attendants; precise times, locations, setups, and assignments for general sessions and press conferences; media availability; the conference schedule and staff assignments;

news; and any other details the recipient should know are typically found in briefing books. Guest speakers and heads of sponsoring agencies appreciate receiving briefings before they meet with conferees. Some may request briefings in advance of arriving at the site; be prepared.

- Assign **workshop monitors** for each workshop. Assignments may include:
  - Check room setup and audiovisual requirements in advance.
  - Greet presenter and attendees.
  - Introduce and thank presenter.
  - Distribute handouts.
  - Distribute and collect evaluations.
  - Keep workshop on schedule. Discreetly letting the speaker know from the back of the room when ten and five minutes remain in the session is one way to do this.
  - Assist in taking attendance, if necessary.
  - Assist in seating when the rooms gets crowded.
  - Meet any other needs of the conferees.
  - Make announcements.
  
- Provide **ribbons** to identify board members, speakers, guests, staff, sponsors, chair, etc.
- If using several floors of a meeting facility, assign **floor supervisors**.
- Use walkie-talkies or a paging system to communicate between supervisors and the chair/secretariat.
- Provide **written instructions** to monitors, supervisors, and others with detailed assignments.
- Set aside time for **training** or assign a supervisor to handle it.
- Assign an **audiovisual chair** to oversee audiovisual requirements. This chair's duties may include moving equipment between sessions from room to room, setting equipment in place, or working with contract audiovisual professionals as needed.
- **Make all conference staff and volunteers feel important--they are!**

## Evaluation

Evaluation can give a qualitative measure of any or every component of the conference; this aspect alone gives it value. Additionally, evaluation can be a valuable tool in planning next year's conference. First, many conferees want to express how they feel about something in which they have invested their time and often their money. This is particularly true for membership conferences at which people believe their input is a right of membership. Second, many speakers and presenters use evaluation to refine their presentations; this is particularly true for professional speakers.

There are a couple of methods that can be used for evaluation. One is to form an **evaluation committee**. This group is composed of approximately a dozen people, evenly divided between persons involved in organizing and planning the conference and others who are external conferees. There's nothing scientific about this structure, but it's intended to create a body that will provide an "honest assessment."

The most common method of evaluation is the use of an **evaluation form**. The form is designed as a questionnaire to gauge conferees' reactions to and thoughts of various components of the conference. The forms can be:

- Distributed and collected at the conference.
- Distributed at the conference and returned either at the conference or by mail.
- Distributed and returned by mail.

Evaluating a week or so after the conference often draws a more reflective response. Mailing your evaluation forms to conferees involves an additional cost, but an email survey is lower cost and often easier for attendees to complete quickly and return.

Evaluating **every** element of the conference probably isn't worth the effort it would take to do so. In addition, there comes a point at which completing an evaluation form becomes burdensome to the respondent. Most planners want to know what major elements of the conference worked, what didn't work, and what can be refined for the future.

Consider evaluating the following elements:

- Conference Planning Committee, Conference Chair, and conference staff.
- Conference site.
- Workshop topics and general session topics.
- Speakers and presenters.
- Special events (tours, receptions, etc.).
- Exhibitors
- Conference registration process.
- Menu selections for banquets.
- Clarity of conference purpose.
- Conference program book.

The design of the evaluation form should facilitate a quick and easy response and at the same time permit a more detailed reply. A sample workshop evaluation and a sample conference evaluation are provided in Appendixes H and I.

## **Committees**

### **Summit Facilities/Logistics Committee Task/Job Description**

Responsible to: Chair/Co-chair Summit Planning Committee

#### Benefits of Position:

- Opportunity for input to design training to benefit volunteers and professionals working with Military Kids and Families.
- Increase skills and knowledge of conference planning.
- Satisfaction from networking with planning committee, attendees and recognizing benefit to others.

#### Major Goals:

- Survey facilities for cost, adequacy to meet needs.
- Contact and make firm contract with facility for food costs and menus, other costs and complementary services.
- Negotiate meeting room arrangements, equipment, handle billing and contact with catering and/or sales manager and other details related to facility.
- In cooperation with workshop and programs committees, obtain equipment needed by speakers, resource people on program.
- Arrange for equipment to be in rooms and moved as needed.

#### Skills Needed:

- Interest in becoming involved in offering day of professional development for military and civilian volunteers and professionals.
- Willing to commit to time needed for tasks.
- Good organizational skills
- (Attendance at a previous Summit is helpful, but not essential.)

#### Term:

- Approximately 12 months in advance of scheduled Summit dates, and a month following for closure.
- One to two meetings with successor.

#### Time Involved:

- Attend 6-8 planning meetings (2-3 hours each plus travel).
- To carry out responsibilities estimate is 2-4 hours monthly for first 6 months increasing to 4-6 hours for some of the weeks immediately preceding the Summit.
- One day attending the Summit.

#### Training:

- Evolves as committee plans; support and guidance from planning committee chair/co-chair.

#### Results Expected:

- A balanced program that includes education, fun and sharing time.
- Tasks completed to meet deadlines.
- Coordination among individuals and committees that insures a program that runs smoothly.

#### Measures to Determine Accomplishment of Goals:

- Feedback (verbal, written and observations) from participants.
- Program planning deadlines move ahead on schedule.

## **Summit Finance Committee Task/Job Description**

Responsible to: Chair/Co-chair Summit Planning Committee

Benefits of Position:

- Opportunity for input to design training to benefit volunteers and professionals working with Military Kids and Families.
- Increase skills and knowledge of conference planning.
- Satisfaction from networking with planning committee, attendees and recognizing benefit to others.

Major Goals:

- Open Summit bank account, receive and disburse monies.
- Pay authorized bills and refunds.
- Prepare summary financial statement following Summit, close out bank account.

Skills Needed:

- Interest in becoming involved in offering day of professional development for military and civilian volunteers and professionals.
- Willing to commit to time needed for tasks.
- Good organizational skills
- Attention to Details
- (Attendance at a previous Summit is helpful, but not essential.)

Term:

- Approximately 12 months in advance of scheduled Summit dates, and a month following for closure.

Time Involved:

- Attend 6-8 planning meetings (2-3 hours each plus travel).
- To carry out responsibilities estimate is 2-4 hours monthly for first 6 months increasing to 4-6 hours for some of the weeks immediately preceding the Summit.
- One day attending the Summit.

Training:

- Evolves as committee plans; support and guidance from planning committee chair/co-chair.

Results Expected:

- A balanced program that includes education, fun and sharing time.
- Tasks completed to meet deadlines.
- Coordination among individuals and committees that insures a program that runs smoothly.

Measures to Determine Accomplishment of Goals:

- Feedback (verbal, written and observations) from participants.
- Program planning deadlines move ahead on schedule.

## **Summit Program/Assemblies/Speakers Committee Task/Job Description**

Responsible to: Chair/Co-chair Summit Planning Committee

Benefits of Position:

- Opportunity for input to design training to benefit volunteers and professionals working with Military Kids and Families.
- Increase skills and knowledge of conference planning.
- Satisfaction from networking with planning committee, attendees and recognizing benefit to others.

Major Goals:

- Plan with committee for assembly speakers and programs.
- Follow up with contact and confirmation of speakers.
- Contact speakers and coordinate their equipment needs, room arrangements; work in cooperation with Facilities/Logistics Committee.
- Contact other assembly participants, i.e. MC, inspiration, etc.
- Provide orientation for speakers, other program participants.
- Prepare agenda for MC; hold briefings before assemblies, if needed.
- Send thank you notes.
- Provide content information for printed program.
- Assist with design and layout of printed program.
- Plan and implement details of each assembly sessions.
- Arrange for backdrops/flags—see they are correctly placed.
- Entertainment

Skills Needed:

- Interest in becoming involved in offering day of professional development for military and civilian volunteers and professionals.
- Willing to commit to time needed for tasks.
- Good communication and organizational skills
- Attention to Details
- (Attendance at a previous Summit is helpful, but not essential.)

Term:

- Approximately 12 months in advance of scheduled Summit dates, and a month following for closure.

Time Involved:

- Attend 6-8 planning meetings (2-3 hours each plus travel).
- To carry out responsibilities estimate is 2-4 hours monthly for first 6 months increasing to 4-6 hours for some of the weeks immediately preceding the Summit.
- One day attending the Summit.

Training:

- Evolves as committee plans; support and guidance from planning committee chairs.

Results Expected:

- A balanced program that includes education, fun and sharing time.
- Tasks completed to meet deadlines.
- Coordination among individuals & committees that insures a program that runs smoothly.

Measures to Determine Accomplishment of Goals:

- Feedback (verbal, written and observations) from participants.
- Program planning deadlines move ahead on schedule.

## **Summit Marketing Committee Task/Job Description**

Responsible to: Chair/Co-chair Summit Planning Committee

Benefits of Position:

- Opportunity for input to design training to benefit volunteers and professionals working with Military Kids and Families.
- Increase skills and knowledge of conference planning.
- Satisfaction from networking with planning committee, attendees and recognizing benefit to others.

Major Goals:

- Develop logo with theme.
- Develop and carry out promotional invitation at previous year's Summit.
- Assist in development of electronic webpage and promotional flyers.
- Develop pre-Summit news releases; prepare PSA's (community bulletin board) with local radio/TV stations.
- Locate contacts in to assist with pre-Summit publicity with news media.
- Prepare sample take-home news release for delegate registration packets.
- Plan with local media for coverage before, during and after Summit.
- Develop press packet for day of the Summit
- Contact other committee members for assistance in recruiting participants.

Skills Needed:

- Interest in becoming involved in offering day of professional development for military and civilian volunteers and professionals.
- Willing to commit to time needed for tasks.
- Good organizational skills
- Attention to Details
- (Attendance at a previous Summit is helpful, but not essential.)

Term:

- Approximately 12 months in advance of scheduled Summit dates, and a month following for closure.

Time Involved:

- Attend 6-8 planning meetings (2-3 hours each plus travel).
- To carry out responsibilities estimate is 2-4 hours monthly for first 6 months increasing to 4-6 hours for some of the weeks immediately preceding the Summit.
- One day attending the Summit.

Training:

- Evolves as committee plans; support and guidance from planning committee chair/co-chair.

Results Expected:

- A balanced program that includes education, fun and sharing time.
- Tasks completed to meet deadlines.
- Coordination among individuals and committees that insures a program that runs smoothly.

Measures to Determine Accomplishment of Goals:

- Feedback (verbal, written and observations) from participants.
- Program planning deadlines move ahead on schedule.

## Summit Registration Committee Task/Job Description

Responsible to: Chair/Co-chair Summit Planning Committee

### Benefits of Position:

- Opportunity for input to design training to benefit volunteers and professionals working with Military Kids and Families.
- Increase skills and knowledge of conference planning.
- Satisfaction from networking with planning committee, attendees and recognizing benefit to others.

### Major Goals:

- Coordinate registration form and accounting system with Finance Committee
- Post-Summit—get information from motel on number of sleeping rooms rented, provide to evaluation committee.
- Make sure registration policies and costs are clear.
- Prepare and/or assist with drafting registration promotion.
- Receive and process registration.
- Prepare tabulation and distribution system for meal tickets and other tickets at registration.
- Prepare roster of participants and resource people.
- Set up and coordinate smooth registration procedures during Summit; recruit volunteers to assist with registration.
- Tabulate numbers for meal count, special ticketed events/tours.
- Plan for name tags.
- Complete name tags for those pre-registered and plan to complete balance at Summit.
- In cooperation with committee, determine if and what type of registration packets are desired.
- Decide on “holder” for registration materials—this might be an imprinted folder, plastic bag, etc. Make contact and/or arrange for these holders.
- Solicit and gather contents for packets. Contents may include: maps, local information (i.e. places to eat in the area, etc.), samples news releases for participants to take home, some sort of pencil and pad. Give some thought as to the “why” of including items; amount of “stuff” in packet is up to committee.
- Assemble and dispense registration packets.
- Write thank you’s.

### Skills Needed:

- Interest in becoming involved in offering day of professional development for military and civilian volunteers and professionals.
- Willing to commit to time needed for tasks.
- Good organizational skills
- Attention to Details
- (Attendance at a previous Summit is helpful, but not essential.)

### Term:

- Approximately 12 months in advance of scheduled Summit dates, and a month following for closure.

Time Involved:

- Attend 6-8 planning meetings (2-3 hours each plus travel).
- To carry out responsibilities estimate is 2-4 hours monthly for first 6 months increasing to 4-6 hours for some of the weeks immediately preceding the Summit.
- One day attending the Summit.

Training:

- Evolves as committee plans; support and guidance from planning committee chair/co-chair.

Results Expected:

- A balanced program that includes education, fun and sharing time.
- Tasks completed to meet deadlines.
- Coordination among individuals and committees that insures a program that runs smoothly.

Measures to Determine Accomplishment of Goals:

- Feedback (verbal, written and observations) from participants.
- Program planning deadlines move ahead on schedule.

## **Summit Teen Panel Committee Task/Job Description**

Responsible to: Chair/Co-chair Summit Planning Committee

Benefits of Position:

- Opportunity for input to design training to benefit volunteers and professionals working with Military Kids and Families.
- Increase skills and knowledge of conference planning.
- Satisfaction from networking with planning committee, attendees and recognizing benefit to others.

Major Goals:

- Identify and select a diverse (branch of service, ethnicity, gender, etc.) group of teens to speak at the Summit.
- Orient and work with Teens to present their thoughts on being a Military Kid.
- Facilitate Teen Panel portion of the Summit.
- Arrange for recognition of the Teens on the panel.

Skills Needed:

- Interest in becoming involved in offering day of professional development for military and civilian volunteers and professionals.
- Willing to commit to time needed for tasks.
- Good organizational skills
- Attention to Details
- (Attendance at a previous Summit is helpful, but not essential.)

Term:

- Approximately 12 months in advance of scheduled Summit dates, and a month following for closure.

Time Involved:

- Attend 6-8 planning meetings (2-3 hours each plus travel).
- To carry out responsibilities estimate is 2-4 hours monthly for first 6 months increasing to 4-6 hours for some of the weeks immediately preceding the Summit.
- One day attending the Summit.

Training:

- Evolves as committee plans; support and guidance from planning committee chair/co-chair.

Results Expected:

- A balanced program that includes education, fun and sharing time.
- Tasks completed to meet deadlines.
- Coordination among individuals and committees that insures a program that runs smoothly.

Measures to Determine Accomplishment of Goals:

- Feedback (verbal, written and observations) from participants.
- Program planning deadlines move ahead on schedule.

## **Summit Workshops Committee Task/Job Description**

Responsible to: Chair/Co-chair Summit Planning Committee

### Benefits of Position:

- Opportunity for input to design training to benefit volunteers and professionals working with Military Kids and Families.
- Increase skills and knowledge of conference planning.
- Satisfaction from networking with planning committee, attendees and recognizing benefit to others.

### Major Goals:

- Plan with overall committee for number of workshops, content and resource people.
- Format workshop part of program. Determine length of workshops, i.e. 45 min, 60 min, 90 min. Seek balance in format and content, i.e. a good mix of general interest and topic specific workshops during the same time slot.
- Publicize opportunity to present workshops; provide an application form.
- Contact and gain commitment from resource people; notify them of acceptance and dates and times their workshop will be held; give them a general idea of content needed, type and number of audience, resources Summit committee can provide.
- Assign workshops to rooms; provide information for program.
- Contact workshop leaders for equipment needs and room arrangements, provide an outline of facilities and equipment for workshops to local arrangements committee; work with facilities/Logistics committee to ensure equipment is available.
- Arrange for a host or hostess for each workshop to introduce speakers, collect evaluations.
- Plan for workshop evaluation.

### Skills Needed:

- Interest in becoming involved in offering day of professional development for military and civilian volunteers and professionals.
- Willing to commit to time needed for tasks.
- Good organizational skills
- Attention to Details
- (Attendance at a previous Summit is helpful, but not essential.)

### Term:

- Approximately 12 months in advance of scheduled Summit dates, and a month following for closure.

### Time Involved:

- Attend 6-8 planning meetings (2-3 hours each plus travel).
- To carry out responsibilities estimate is 2-4 hours monthly for first 6 months increasing to 4-6 hours for some of the weeks immediately preceding the Summit.
- One day attending the Summit.

### Training:

- Evolves as committee plans; support and guidance from planning committee chair/co-chair.

### Results Expected:

- A balanced program that includes education, fun and sharing time.
- Tasks completed to meet deadlines.

- Coordination among individuals and committees that insures a program that runs smoothly.

Measures to Determine Accomplishment of Goals:

- Feedback (verbal, written and observations) from participants.
- Program planning deadlines move ahead on schedule.

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## **Summit Sponsors and Exhibitors Committee Task/Job Description**

Responsible to: Chair/Co-chair Summit Planning Committee

Benefits of Position:

- Opportunity for input to design training to benefit volunteers and professionals working with Military Kids and Families.
- Increase skills and knowledge of conference planning.
- Satisfaction from networking with planning committee, attendees and recognizing benefit to others.

Major Goals:

- Develop Sponsor invitations and applications with Finance Committee.
- Develop Sponsor levels for recognition at the event with Finance Committee.
- Promote and solicit sponsorship to meet financial goals in coordination with Finance Committee.
- Provide Sponsor and Exhibitor information to Program designer.
- Develop and distribute Exhibitor invitation and applications.
- Plan for space and equipment needed for exhibits cooperatively with Facilities/Logistics Committee.
- Assign exhibit space.
- Be available during set up and take down time to assist and facilitate attractive exhibit space..
- Write thank you's.

Skills Needed:

- Interest in becoming involved in offering day of professional development for military and civilian volunteers and professionals.
- Willing to commit to time needed for tasks.
- Good organizational skills
- Attention to Details
- (Attendance at a previous Summit is helpful, but not essential.)

Term:

- Approximately 12 months in advance of scheduled Summit dates, and a month following for closure.

Time Involved:

- Attend 6-8 planning meetings (2-3 hours each plus travel).
- To carry out responsibilities estimate is 2-4 hours monthly for first 6 months increasing to 4-6 hours for some of the weeks immediately preceding the Summit.
- One day attending the Summit.

Training:

- Evolves as committee plans; support and guidance from planning committee chair/co-chair.

Results Expected:

- A balanced program that includes education, fun and sharing time.
- Tasks completed to meet deadlines.
- Coordination among individuals and committees that insures a program that runs smoothly.

Measures to Determine Accomplishment of Goals:

- Feedback (verbal, written and observations) from participants.
- Program planning deadlines move ahead on schedule.

## **Summit Chair/Co-Chairs Task/Job Description**

Responsible to: Summit Planning Committee

Benefits of Position:

- Opportunity for input to design training to benefit volunteers and professionals working with Military Kids and Families.
- Increase skills and knowledge of conference planning.
- Satisfaction from networking with planning committee, attendees and recognizing benefit to others.

Major Goals:

- Recruit volunteers for planning committee within host district.
- Call and chair planning committee meetings, develop agenda, review progress, guide implementation, make sure minutes are taken of meetings and sent to committee members.
- Name an executive committee (chairs of major tasks and functions) (optional).
- Coordinate the planning and delegation of responsibility for development of program, speakers, assemblies, meals and other activities.
- Write pre-post Summit articles for "4-H Leaders' Corner".
- Review reports, delegate additional responsibilities.
- Assist with development of budget.
- Assist with overall evaluation and post-Summit report.

Skills Needed:

- Interest in becoming involved in offering day of professional development for military and civilian volunteers and professionals.
- Willing to commit to time needed for tasks.
- Good communication and organizational skills.
- Consensus building skills.
- Attention to Details.
- (Attendance at a previous Summit is helpful, but not essential.)

Term:

- Approximately 12 months in advance of scheduled Summit dates, and a month following for closure.

Time Involved:

- Attend 6-8 planning meetings (2-3 hours each plus travel).
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Measures to Determine Accomplishment of Goals:

- Feedback (verbal, written and observations) from participants.
- Program planning deadlines move ahead on schedule.

**Appendices**

Workshop RFP

Marketing Materials – save the date & 1-pg flyer

Sponsor Forms and Letters

Exhibitor Forms and Letters

Program

Summit Evaluation Form

DRAFT