

**State Summit Planning Guide**

**September 2019**

**Draft**

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**Thank you!**

Hi, there! You’re on a journey of important work that will benefit community members in your state. Thank you for your leadership! This guide is designed to walk you step-by-step through the planning process. The details are based on the **sample agenda** in the Toolkit at the end of this guide. If you adjust the agenda, be sure to also make adjustments to the suggestions included below.

**First steps**

A few key details form the first few steps. These include:

* Partners
* Date of the event
* Location
* Number of attendees expected
* Budget

**Partners**

Identifying partners willing to support your efforts is the first goal. These events require lots of willing hands. In addition to making the event preparation more manageable, having partners increases buy-in, expands marketing opportunities, and strengthens networks within the state. So, as you begin, think about who has already agreed to help as well as who might be willing to assist if asked. Here are a few organizations or groups that might be interested in helping:

* Cooperative Extension Service, within the Land-Grant Universities
* USDA field offices that serve the state
* Faith based organizations
* Education organizations
* Economic Development agencies
* Social Service entities
* Non-profits

Consider forming a steering committee of 8-15 individuals that can help plan the event. You can use the **Summit Overview and Sample Agenda** in the Toolkit as a way of encouraging participation.

**Selecting a Date**

Planning a successful event takes time. So selecting a date should provide ample lead time for getting all the pieces ready. A minimum of 3 months for planning is recommended. Things to consider when selecting a date:

* What other events are happening that would interfere with participation?
* What other events might be good to tag onto (add the summit right before or after to add value to another event)
* Are there any major holidays that would hinder participation?
* Do you have a venue that is available on the date you are considering?
* Are partners aware of any other scheduling considerations that should be considered?

**Location:**

In order to host a summit as suggested in the **sample agenda**, you will need a facility that has the following options:

* One general session room with enough space to seat all attendees, ideally set up at round tables to foster group discussion.
* Four breakout rooms that can each hold about ¼ of your total expected attendance. Ideally, these are also set up with round tables. Hint: One of the breakout sessions can possibly be held in the general session room by moving participants up. This would mean you only need three more rooms.

*Rounds/Cluster Setup*

**Other important considerations:**

* Is the location easy to get to and in an area that people feel comfortable attending?
* Is wireless internet available in the meeting rooms? Is there a charge for this service? If so, be sure to include in the budget. (This might not be needed, depending on the local agenda.)
* Is parking accessible? Is there a fee for parking? If so, consider whether vouchers are available OR be sure to communicate costs to participants.
* What is the maximum group size the location can accommodate? Is it adequate without participants feeling overcrowded?
* Is there a rental fee for meeting rooms? If so, add this to your budget.
* How much time prior to the start of the event will you be allowed to set up, and how much time afterward will you have to pack up?
* For an all-day event where you do not plan to provide a meal, are there ample food venues nearby for participants to get lunch?
* Is there a set-up fee and/or costs for tables/chairs? If so, be sure to add these to your **budget sheet** located in the Toolkit.

**Audio/Visual (AV) Needs**

Having Audio/Visual needs met can help ensure a smooth event. For the draft summit, the following equipment is needed. Typically, there are three possible ways to get equipment needs met. These are:

* Use equipment that is available at the venue – some venues have equipment built in or otherwise available at no additional cost.
* Rent equipment – Some venues rent equipment at additional costs OR equipment may be rented from another source. (Be sure to add to **budget sheet**.)
* You or your partners may be able to provide equipment. Be sure to check with the venue to ensure you can use your own equipment. Some facilities do not allow outside equipment usage.

Recommended AV for this meeting

* General Session
	+ Projector (possibly more than one depending on the size of the room)
	+ Projector screen(s)
	+ Microphone and speakers
	+ Hand-held microphone for audience participation
	+ Electric Cart (a table for laptop and projector with electric cords run to it)
	+ Podium
	+ Laptop
	+ Easel and flip chart
* Breakout rooms (one each of the following):
	+ Projector
	+ Projector screen
	+ Electric Cart(a table for laptop and projector with electric cords run to it)
	+ Laptop
	+ Easel and flip chart

Things to consider

* If renting or using the facility’s equipment, are there service fees for AV setup?
* Will AV technicians be available during the event and how much do they charge?
* If you are using your own or partners’ equipment, will you have assistants on site that can help with setup and trouble-shooting issues?

**Food/Beverage Needs**

If you are planning to serve refreshments or a meal, consider these thoughts:

* What does the venue provide free of charge (i.e. some places provide water as a courtesy, or a water station may be located in an easy to access location)?
* Food allergies and preferences should be considered. A list of common concerns are noted below. If you have a registration form, you can ask participants about these concerns ahead of time.
* For an all-day event where you do not plan to offer a meal, be sure to plan ample time for people to get lunch on their own.
* What is the budget for food and beverage? Be sure to include this on your **budget sheet**.
* Are there any “hidden” fees such as delivery fees, service fees, gratuities, or extra taxes?

**Common Food Preference and Allergies**

Food preference and allergies should be taken seriously when planning your event. Be sure to ask about these on your registration form and inform the venue or caterer as soon as possible.

Common Food Preference and Allergies:

* Vegetarian
* Vegan (should not be included as vegetarian)
* Non-Dairy
* Gluten Free (wheat allergy)
* Religion-Based Preference
* Nut allergy
* Soy Allergy
* Shellfish Allergy

**Advertising Your Event**

Getting the word out about your event as soon as possible will help ensure strong participation. Layering messages along the way can also help grow interest. For example:

* Save the date cards or emails can be sent as soon as you set the date
* Informational flyers can be distributed when details are cleared up
* A note when registration is launched (if applicable) can let people know it’s time to join in
* Follow up messages of deadlines can help ensure the last seats are filled

Be sure to use email and mailing lists that reach a large group of people. Consider the following when designing your marketing plan:

* Who do we want to attend? Be as specific as possible about groups you would like to target.
* Where does our target audience typically find out about events in the community. Keep in mind that you may need more than one avenue to reach your audience. Some options may be:
	+ Local media (newspaper, radio, television)
	+ Flyers at specific places your target audience visits
	+ Email
	+ Social Media
	+ Mailed invitations
	+ Invitations to key stakeholders (faith leaders, community organizations, schools, etc.)

**Things to include in marketing**

* Title of the event
* Purpose of the event – what participants can expect to gain
* Logistics (location, date, times)
* Sponsors
* How to register or RSVP
* Deadline for registration
* Where to learn more (contact name, phone, website, etc.)

**Registration or RSVPs**

While registration may not be required for your event to be a success, it is often helpful to know how many people are attending so that you can have adequate material and space prepared. Also, by using a registration process or RSVP, you can preprint nametags and onsite check in sheets that help move the process forward. Once you have confirmed the venue details, it is time to set up an event registration. Be sure to set and communicate a deadline for accepting registrants.

Additionally, if you are needing to charge a fee for attendees in order to cover costs, a registration process may be useful to manage costs up front. Your partners may have mechanisms in place for managing registration for events. If you are charging a registration fee it is important to include information about cancellations and late fees.

Tools to do your own registration:

* For collecting fees: Eventbrite and Ticket Tailor are both well rated. Both charge a small fee per registrant that can normally be wrapped into the registration price.
* For free registration (RSVP only): Qualtrics or Google Forms can collect information that can be downloaded into an Excel table.

See a **sample registration** form in the Toolkit. Be sure to include event details on the registration form such as dates/locations as well as registration deadlines.

**Planning the Program**

There are several things you’ll need to do in preparation for your event. This includes ordering or printing necessary materials, recruiting facilitators and presenters, and setting up the venue. Using the sample agenda, suggestions for each of these areas are below.

**Facilitators/Presenters**

You may decide to invite various facilitators and presenters to assist at your event. You must first determine whether you need to pay these individuals for their service or if travel reimbursement is needed. Be sure to work out those details early so you can add them to your **budget sheet.** Also, be sure to include them in your attendee and food counts as it is customary to waive their registration fee if you are charging one.

* Emcee – This person will provide instructions, introduce presenters, and otherwise keep the agenda moving forward. This role can be shared among several people.
* Welcome – This may be one or more people that provide a welcome as appropriate for your venue and partnership. This could include local elected/appointed officials or someone from your planning team.
* Snapshots – One purpose of the Summits is to introduce participants to the vast array of USDA and other relevant programs. The Snapshot segment is a time to allow those agencies to provide a brief overview of their programs relevant to the USDA Rural Prosperity Priorities. As you identify the individuals that will be providing these snapshots, communicate to them that you would like them to keep their comments under 10 minutes each. Let them know that you will have a computer and projector available if they would like to use a PowerPoint. It is recommended that you ask them to send their slides to you prior to the event so that you can load them on the computer before beginning. This will make for a smoother event.
* Breakout facilitators – facilitators will be needed to lead the different breakout sessions. Materials for the sessions are already developed for use to ease this task. However, you will need to identify facilitators that are comfortable with the concepts presented and capable of guiding groups. Your partners may be able to assist in identifying facilitators.
* Subject Matter Experts – For the breakouts on priorities, Subject Matter Experts (SMEs) from USDA and other agencies represented will be needed to speak in greater detail to the specific opportunities related to each of the USDA Rural Priorities. These should be individuals that are well versed in their agencies’ programs and are able to answer questions from attendees. The SMEs could also bring PowerPoints for these sessions. Handouts are also encouraged. A **SME Quick Guide** is provided in the Toolkit.

**Materials**

Having the right materials on hand will help ensure the meeting runs smoothly. Some materials will be needed for different purposes such as those listed below. A list of **suggested materials** is included in the Toolkit:

* Registration table
* Keynote session
* Breakout sessions
* General supplies

**Setting up the Venue**

As you prepare for the event, consider how you will set up the space. For instance, think through these questions:

* Where should registration be set up?
* What signs are needed to help people move about easily?
* If food or refreshments will be available, where will they be staged? And where will meals be eaten (if applicable)?

**Budget**

Setting up a preliminary budget before you start will help keep the event within boundaries. Be sure to update that budget throughout the event planning process. A sample **budget sheet** is in the Toolkit.

**Tips for controlling costs for your event:**

* Maintain a history of food, audio visual, venue, and other agreements
* Box lunches or buffets are usually less expensive than a plated “sit down” meal
* For AV, be aware of setup/labor/service fees
* Ask planning team members what they have that can be contributed/used. For instance, do they have AV equipment, a large coffee pot, etc.?

**TOOLKIT**

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**Event Planning Guide**

Name of the Event: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Meeting Dates & Times: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Location of Meeting: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Do you need a contract for the venue?: Y N

If yes, who is the contact person? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Anticipated Number of Participants: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

-------------------------- **Location Information** ------------------------

Name of Location: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Location Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Free Internet: Y N Wi-Fi/Coupon Code if Needed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Parking Provided: Y N Parking Cost (if applicable): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contact Person: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contact Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Event Name for Signage: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Room Rental Fee: Y N Room Rental Cost: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Deposit Required: Y N Deposit Amount: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Due by: \_\_\_\_\_\_\_\_\_\_\_

Number of Breakout Rooms: \_\_\_\_\_\_\_\_\_\_\_\_\_\_ Estimated Participants per Room: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Room/ Table Set Up General Session: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Breakout Rooms: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Number of Tables needed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (General Session and breakouts)

Number of Chairs needed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (General Session and breakouts)

----------------------- **AV/Equipment Information** ----------------------

|  |
| --- |
| **General Session** |
| **Equipment** | **Who is providing?** | **Cost** |
|  Projector (possibly more than one depending on the size of the room) |  |  |
| Projector Screen(s) |  |  |
| Microphone & Speakers |  |  |
| Hand-held microphone (for audience participation) |  |  |
| Electric Cart (a table for laptop & projector with electric cords running to it) |  |  |
| Podium |  |  |
| Laptop |  |  |
| Easel & Flip Chart |  |  |

|  |
| --- |
| **Breakout Session #1** |
| **Equipment** | **Who is providing?** | **Cost** |
| Projector |  |  |
| Projector Screen |  |  |
| Electric Cart |  |  |
| Laptop |  |  |
| Easel & Flip Chart |  |  |

|  |
| --- |
| **Breakout Session #2** |
| **Equipment** | **Who is providing?** | **Cost** |
| Projector |  |  |
| Projector Screen |  |  |
| Electric Cart |  |  |
| Laptop |  |  |
| Easel & Flip Chart |  |  |

|  |
| --- |
| **Breakout Session #3** |
| **Equipment** | **Who is providing?** | **Cost** |
| Projector |  |  |
| Projector Screen |  |  |
| Electric Cart |  |  |
| Laptop |  |  |
| Easel & Flip Chart |  |  |

|  |
| --- |
| **Breakout Session #1** |
| **Equipment** | **Who is providing?** | **Cost** |
| Projector |  |  |
| Projector Screen |  |  |
| Electric Cart |  |  |
| Laptop |  |  |
| Easel & Flip Chart |  |  |

-------------------------- **Presenters** -----------------------------

Emcee: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Welcome: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Snapshots: Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Agency: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Agency: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Agency: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Agency: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Agency: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

SMEs: Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Agency: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Agency: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Agency: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Agency: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Agency: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Agency: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Presenters: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cost: \_\_\_\_\_\_\_\_\_\_ Contract: \_\_\_\_\_\_\_\_\_\_\_

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cost: \_\_\_\_\_\_\_\_\_\_ Contract: \_\_\_\_\_\_\_\_\_\_\_

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cost: \_\_\_\_\_\_\_\_\_\_ Contract: \_\_\_\_\_\_\_\_\_\_\_

Facilitators: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cost: \_\_\_\_\_\_\_\_\_\_ Contract: \_\_\_\_\_\_\_\_\_\_\_

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cost: \_\_\_\_\_\_\_\_\_\_ Contract: \_\_\_\_\_\_\_\_\_\_\_

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 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cost: \_\_\_\_\_\_\_\_\_\_ Contract: \_\_\_\_\_\_\_\_\_\_\_

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cost: \_\_\_\_\_\_\_\_\_\_ Contract: \_\_\_\_\_\_\_\_\_\_\_

------------------------- **Food and Beverage** ---------------------------

Catering Contact: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Number of attendees per meal

Breakfast: \_\_\_\_\_\_\_\_\_\_ AM Break: \_\_\_\_\_\_\_\_\_\_ Lunch: \_\_\_\_\_\_\_\_\_\_ PM Break: \_\_\_\_\_\_\_\_\_\_

Is water provided in each room: Y N

Food Restrictions/Allergies: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Is there a service fee or tax on food: Y N If so, how much?: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |  |
| --- | --- | --- | --- |
| **Meal** | **Food Items** | **Cost per person** | **Total cost** |
| Beverage service  |  |  |  |
| Morning break |  |  |  |
| Lunch |  |  |  |
| Afternoon break |  |  |  |
| Subtotal |  |  |  |
| Taxes/Service/Setup fees |  |  |  |
| Total Cost |  |  |  |

------------------------- **Registration/RSVP** ---------------------------

Registration Method: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Person(s) Managing: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Registration Info Sent to Participants: \_\_\_\_/\_\_\_\_/\_\_\_\_ Final Registration Deadline: \_\_\_\_/\_\_\_\_/\_\_\_

Early Bird Registration: Y N Cost: \_\_\_\_\_\_\_\_\_\_\_\_\_\_ Deadline: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Regular Registration: Y N Cost: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Deadline: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Late Registration: Y N Cost: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Deadline: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Event Timeline**

|  |  |  |
| --- | --- | --- |
| **To Do** | **Target Date** | **Completion Date** |
|  | **ASAP** |  |
| Prepare budget |  |  |
| Book venue |  |  |
| Book presenters/facilitators |  |  |
| Set draft agenda |  |  |
| Determine estimated # of attendees |  |  |
| Prepare registration |  |  |
|  | **2-3 months before** |  |
| Send out registration information |  |  |
| Confirm AV needs |  |  |
| Confirm food needs |  |  |
| Sign all vendor contracts |  |  |
| Order/design all materials (badges, folders, print materials, etc.) |  |  |
| Track registration numbers |  |  |
|  | **2 weeks before** |  |
| Finalize food menus |  |  |
| Finalize AV needs |  |  |
| Assemble participant materials |  |  |
|  | **1 week before** |  |
| Prepare name badges |  |  |
| Create sign-in sheet |  |  |
| Pack supplies/equipment |  |  |
|  | **Day before the event (if possible)** |  |
| Meet with venue contact |  |  |
| Bring materials |  |  |
| Organize registration desk & other supplies |  |  |
|  | **Morning of the event** |  |
| Meet with facilitators and SMEs to introduce them and get them oriented to their breakout rooms |  |  |
| Load PowerPoints of presenters and breakouts (as needed) |  |  |
| Check to ensure all AV equipment is functioning and ready for use |  |  |
| Have someone stationed at the registration desk early to welcome participants as they arrive |  |  |
| Ensure refreshments are set out (if applicable) |  |  |
|  | **After the event** |  |
| Pay the bills |  |  |
| Complete expense reports/compare to budget |  |  |
| Send thank you note to presenters  |  |  |
| Follow up with participants as needed |  |  |

**Budget Worksheet**

# of Participants: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Estimated Cost Per Person: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Budget: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |
| --- | --- | --- |
| **Expense Items** | **Projected Cost** | **Actual Cost** |
| **CONTRACTUAL FEES** |  |  |
| Meeting Room Charges |  |  |
| Food & Beverage |  |  |
|  Breakfast |  |  |
|  AM Break |  |  |
|  Lunch |  |  |
|  PM Break |  |  |
| AV/Equipment |  |  |
|  Equipment Rental |  |  |
|  Labor |  |  |
|  Laptop Rental |  |  |
|  Internet Fees |  |  |
|  Other Fees  |  |  |
| Hotel Taxes, Fees, Service Charges |  |  |
| **OTHER FEES** |  |  |
| Materials |  |  |
|  Printed Materials |  |  |
|  Name Badges |  |  |
|  Signage/Displays |  |  |
|  Flyers |  |  |
|  Office Supplies |  |  |
| Facilitator/Presenter Fees |  |  |
|  |  |  |
| **TOTAL EXPENSES:** |  |  |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| **Revenue Items** | **Projected Cost** | **Actual Cost** |
| Registration Fees |  |  |
| Sponsorships |  |  |
| Other |  |  |
|  |  |  |
| **TOTAL REVENUES:** |  |  |

**COMMUNITY PROSPERITY SUMMIT OVERVIEW**

Aligning with the priorities identified by the Task Force on Agriculture and Rural Prosperity, the USDA Office of Partnerships and Public Engagement (OPPE) seeks to foster community prosperity in rural areas. To achieve this goal, OPPE wishes to bring together partners who are key to the revitalization of rural America. These summits will bring hope and opportunity, wealth creation, and asset building to the forefront of community development.

**Invited Community Partners**

* 2501 Grantees
* Minority Serving Land-Grant Universities (1890 and 1994)
* Hispanic-Serving Institutions and Hispanic-Serving Agricultural Colleges and Universities
* Historically Black Colleges and Universities
* 1862 Land-Grant Universities
* Members of Rural and/or Agriculture Focused Communities
* Communities of Faith and Opportunity
* Local, State, and Tribal Governments
* Community and Economic Development Community
* Public and Private Sectors
* Faith Leaders
* Other Federal Partners
* Asian American, Native American, Pacific Islander Serving Institutions

**Community Prosperity Summit Objectives**

* Fostering progress toward the Task Force on Agriculture and Rural Prosperity Priorities
* Examining and connecting USDA and other federal programs of value to agriculture and rural communities
* Demonstrating how to identify and approach relevant partners
* Modeling a planning process for helping participants work within local communities to have success moving forward
* Developing and implementing local prosperity councils

**Takeaways – Participants Will Leave With:**

* A base understanding of USDA programs that can help them address their selected priority
* A tool to guide exploration of range of assets to assist in addressing their selected priority
* A draft partnership list and strategy for making invitations
* A resource list of data sources relevant to the selected priority
* A framework for telling the story of the local need
* A planning tool to guide next steps
* A broader set of networking relationships from among Summit participants

**State Summit – Sample Agenda**

**7:00** Registration and Networking Breakfast

7:00 Subject Matter Experts and Facilitators Meeting

8:00 Opening Session

8:00 Opening remarks and state welcome

8:20 Introduction to USDA Ag & Rural Prosperity Priorities

8:40 Snapshots (5 minutes each) – USDA focused with other federal agencies as appropriate

**9:40** Break and Networking

10:00 Transition to breakouts

10:15 Breakout Session 1: Connecting Assets to Priorities (one breakout room per priority, possibly combining e-connectivity and innovation into a single session; Could also possibly combine economic development and workforce development)

**11:45** Working Lunch – 1-3 short (10 minute) success stories

12:45 Break and transition to sessions

1:00 Breakout Session 2: Choose one of the following (repeated during Breakout 3)

* Building Strong Partnerships
* Telling Your Story – Using Data
* Prioritizing and Planning

**2:30** Break & Transition

2:45 Breakout Session 3:

* Building Strong Partnerships
* Telling Your Story – Using Data
* Prioritizing and Planning

4:00 Roundtable discussions – next steps

**4:30** Adjourn

**Sample Annotated Agenda**

**State Community Prosperity Summit**

Anytown, USA

Month, Date, 2019

**After attending this training, participants will be able to:**

* Foster progress toward the Task Force on Agriculture and Rural Prosperity Priorities
* Examine and connecting USDA and other federal programs of value to agriculture and rural communities
* Demonstrate how to identify and approach relevant partners
* Model a planning process for helping participants work within local communities to have success moving forward
* Develop a local prosperity council

**For the sake of the agenda below, these numbers are used to represent the respective priorities:**

1. E-Connectivity & Technology Innovation

2. Workforce

3. Quality of Life

4. Economic Development

**LGU Facilitation Team:**

1. e-Connect & Innovation –
2. Workforce –
3. Quality of Life –
4. Economic Development –

**Tuesday, June 25, 2019**

| **Time**  | **Activity**  | **Objective / Goal** | **Lead** | **Materials** |
| --- | --- | --- | --- | --- |
| 7:00 | Registration; networking breakfast | * Provide orientation materials for participants
* Facilitate initial connections among participants through icebreaker questions.
 | \_\_\_\_\_\_\_ will manage registration | NametagsAgendasFoldersIcebreaker questions to promote networking (on cards at table)* What is your name?
* What organization do you represent?
* What interested you about coming to this Summit?
 |
| 7:00 | Facilitators and SMEs meet in respective breakout room to insert presenter names/order; load PPTS (if applicable) | * Prepare for breakout sessions
* Add names of presenters/agencies to slide
* Load PowerPoints (if applicable)
* Facilitators meet Subject Matter Experts
 | Facilitators* e-Connect & Innovation –
* Workforce –
* Quality of Life –
* Economic Development –
 | Handouts for sessionsPowerPoint slidesHandouts from SMEs |
| 8:00 – 8:20  | Opening Session * Opening remarks and state welcome
* Orientation to the event
* Introduction of VIPs
 | * Welcome group
* Explain any misc. housekeeping
* Provide an overview of agenda
* Introduce any VIPs
 | Emcee \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | AgendaLogistics notes –To be developed per venue |
|  **Local Leadership – Welcome** * List individuals providing a formal welcome
 |
| 8:20 – 8:40 | Introduction to USDA Ag & Rural Prosperity Priorities | * Orient participants to the Priorities by providing:
* Brief background
* Quick overview of each one and its focus
* Why this is the focus of these summits
* Aid participants in considering which priorities they want to explore during the Summit
 | OPPE staff | Priority handout |
| 8:40 – 9:40 | USDA Snapshot | * Provide an overview of how USDA works in partnership with other federal agencies as appropriate to meet Ag & Rural Prosperity Priorities
 | Federal agency partners (see below) | Handout summary by priority |
| **Snapshots*** Contact, Federal Agency
* Contact, Federal Agency
* Contact, Federal Agency
* Contact, Federal Agency
* Contact, Federal Agency
 |
| 9:40 | Break and networking | * Guide participants to meet 2-5 new individuals
 |  | Networking prompt |
| 10:00 | Transition to breakouts |  |  |  |
| 10:15 – 11:45 | Breakout Session 1 ***– Connecting Assets to Priorities*** | Structure the session to allow:* USDA specialists to provide more detail to programs available (30 minutes total)
* RRDC explanation of asset mapping (15 minutes)
* Participant exercise to map assets related to the selected priority – What do you already have? (30 minutes)
* Debrief (15 minutes)
 | Facilitators (list names)* e-Connect & Innovation –
* Quality of Life –
* Workforce
* Economic Development –

Priority Subject Matter Experts (SMEs) | Handout of USDA programs by priority; one breakout room per priorityAsset Mapping handoutProjector/Computer |
| 11:45 | Working Lunch ***–*** could include 1-3 short (10 minute) success storiesPresenters (optional):* Name
* Name
 | * Initiate conversations around priorities
 |  | Questions to facilitate discussion (on cards at tables)* Which of the USDA Rural and Agriculture Prosperity Priorities are you most interested in exploring? Why?
* What would success in pursuing this priority mean for your community?
 |
| **USDA Subject Matter Expert – Tracks**Track 1: E-Connectivity / Innovation Technology* Contact, Federal Agency
* Contact, Federal Agency

Track 2: Rural Workforce* Contact, Federal Agency
* Contact, Federal Agency

Track 3: Quality of Life* Contact, Federal Agency
* Contact, Federal Agency

Track 4: Economic Development* Contact, Federal Agency
* Contact, Federal Agency
 |
| 12:45  | Break and transition to sessions |  |  |  |
| 1:00 | Breakout Session 2 – Choose one of the following (repeated during Breakout 3)* Building Strong Partnerships
* Telling Your Story – Using Data
* Prioritizing and Planning
 | Guide participants in:* Identifying appropriate partners based on the priority
* Why a public/private mix is important
* Developing attainable goals
* Framing an invitation that is compelling
* WOW of Bridge Building
 | Facilitators * List names
 | Win-Win InvitationRed Light/Green LightSMART GoalsBridge Building HandoutPlan of Action (Logic Model)Flip Chart PaperMarkersTape |
| 2:30 | Break and transition to Breakout Session 3 |  |  |  |
| 2:45 | Breakout Session 3 – * Building Strong Partnerships
* Telling Your Story – Using Data
* Prioritizing and Planning
 | Same as above - repeated | Facilitators  | Same as above - repeated |
| 4:00 | Roundtable discussions – Next Steps | * Share insights among participants on new ideas, new perspectives, new dreams
 | Emcee | Projector/ComputerRoundtable discussion questions on cards at tables* What new ideas, insights, or perspectives did you gain today?
* How could this help you think through opportunities in the future?

One person report out from each table- Notecards for recording one big idea. |
| 4:30 | Adjourn – |  |  |  |

**Subject Matter Experts (SME) Quick Guide to Breakout Sessions**

**The breakout sessions will focus on the USDA Ag & Rural Prosperity Priorities:**

* eConnectivity
* Workforce
* Innovation
* Economic Development
* Quality of Life

**Preparing for Breakouts:** Please meet in your respective breakout room at 7:00 a.m. on the first morning to:

* Meet the facilitator for the sessions
* Determine order for presenting and insert presenter names (if more than one SME)
* Load PowerPoints (if applicable)

**Breakouts:** Each breakout will have a facilitator.  This person will manage time and lead the activities described below.

* **Breakout 1 - Connecting Assets to Priorities** – Participants will choose one of the priority areas listed above for this breakout session. SMEs will divide out into these rooms to share information specific to that priority. SMEs will have 30 minutes total to talk about programs specific to that priority.  If more than one agency is presenting, the time will need to be divided among the SMEs to keep the total time under 30 minutes. This is part of a longer session so managing the time will be important. During the activity, participants will be identifying assets available to them already on which they could build an initiative or project related to the priority they are exploring. During the activity portion led by the facilitator, SMEs are asked to move around the room and assist as appropriate for your expertise and the work that is being done.
* **Breakout 2 and Breakout 3 –** During these two sessions, participants can choose one of the three sessions listed below. So, they will be able to attend two of the three. SMEs can assist by joining these sessions and providing expertise to aid the facilitator as appropriate.
* **Building Strong Partnerships –** SMEs don’t have a dedicated time to present, but can be ready to assist participants as they work through this hands-on process, which is to identify relevant partners for the priority being discussed. The USDA agency may be one of those relevant partners if there are programs that relate to the work being considered.
* **Telling Your Story – Using Data** – SMEs don’t have a dedicated time to present, but can be ready to assist participants with the hands-on process, which is to explore relevant data to help gauge where the community is and frame a needs statement. Having SMEs on hand to give feedback to participants as they work would be helpful.
* **Breakout 5 – Prioritizing and Planning –** SMEs don’t have a dedicated time to present, but can be ready to assist participants with the hands-on process, which is to generate relevant project ideas and write SMART goals. Providing feedback or assistance to participants as they work can be helpful.

**State Summits Materials List**

**Registration:**

* Nametags + blanks (inserts & holders)
* Sign in sheet (plenty of empty lines)
* Folders with stickers on front
	+ Summit overview and agenda (printed front/back) [Template]
	+ Overview of USDA Ag. & Rural Task Force Priorities and Priority Infographic (front/back)
	+ Call to Action Packet (5 priorities)
	+ Data link summaries
	+ Evaluation
* Pens
* Sharpie for writing in nametags if needed
* Scissors
* Tape

**For General Session:**

* Projector
* Computer
* Screen
* Electric Cart
* Timekeeper cards (suggested cards: 5 Minutes, 1 Minute, Time’s Up)
* Overview PowerPoint

**In each breakout room:**

* Projector
* Screen
* Computer
* Easel & chart
* Markers
* Timekeeper cards (1 set per room)

**Handouts by session:**

* **Breakout 1: Connecting Assets to Priorities**
	+ Seven Community Capitals
	+ Asset Map Handout
	+ Handouts from agencies (Subject Matter Experts) – they will provide
* **Breakout 2 & 3 – Option A: Building Strong Partnerships**
	+ Designing a Win-Win Partnership
	+ Red Light/Green Light Handout
* **Breakout 2 & 3 – Option B: Telling Your Story – data session**
	+ Data handouts for each priority (5)
	+ Telling My Story – Writing a Need Statement
	+ Baseball mini cards (if voting for a favorite)
* **Breakout 2 & 3 – Option C: Prioritizing and Planning**
	+ SMART Goals Handout
	+ Bridge Building Handout

**For Facilitators:**

* Annotated agenda
* PPT slides (6 per page-horizontal)
* Copy of handouts
* Sign-in sheet for each session (6 total per facilitator)

**For Subject Matter Experts:**

* Annotated Agenda
* One-page quick guide per person

**State Summit Registration - SAMPLE**

**September 16th, 2019, 7am – 4:30 pm, Atlanta, GA**

Registration Deadline: 10/15/19

First Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Last Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Preferred Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Organization: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Mailing Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Zip: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Food Allergies or Preferences: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**\*only if you are charging registration\***

Registration Fee: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Late Registration: $\_\_\_\_\_\_\_\_\_\_\_ after\_\_\_\_/\_\_\_\_/\_\_\_\_

Person responsible for processing payment: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Payment Processor Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Payment Processor Phone:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Cancellations:

If you must cancel, please notify Jane Doe by email at jane\_doe@example.com by 10/31/19 at which time a refund for the registration amount, less a $50 cancellation fee, will be processed. Cancellations after this date will not be refunded.

Action Planning Chart

|  |  |  |
| --- | --- | --- |
| WHAT needs to get done? | WHO will take responsibility | WHEN will the task be finished |
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