

Field Guide

#1: INTERNAL PLANNING PRECEDING THE COLLABORATION

Think of collaboration as a journey. There are a lot of bumps in the road, perhaps even a dip.

Caroline Marshall, Virginia
Enduring Communities Five-State Convening
October 6–7, 2006

This is very interactive, we are part of this team and you really do walk away with a great sense of accountability and ownership in the overall process.

Shanna Futral, Utah
Enduring Communities Five-State Convening
October 6–7, 2006

Visioning, creating, and implementing a large-scale collaborative project does not require new professional skills, although it often involves applying existing skills in new ways, considerable institutional flexibility, creativity, ingenuity, and patience.

Keep in mind the iron triangle of all projects: resources, time, and results. Limited project resources mean that as much time as possible should be spent in the planning phase. Limited time also means that project quality and results may suffer and ultimately consume additional resources. In other words, a fast project is not cheap, so spend sufficient time in the

planning phase in order to control the unnecessary consumption of resources and achieve the desired results.

- Consider various approaches to implementing the project

Sample Document

- 1-1 Project Logic Model
- Conduct front-end research into like-minded institutions, factoring in:
 - Compatible institutional mission and vision
 - Prior working relationships
 - Strong track record with collaborative projects
- Qualities and traits that are desirable in all team members
 - Respectful, good-hearted
 - Professional
 - Inquisitive and open to new ideas and processes
 - Committed to working as a team
 - Active listeners and communicators
 - Problem-solvers
 - Lifelong learners
 - Reflective
- Remain updated on relevant scholarship and research
 - Seek word-of-mouth referrals from a variety of sources
 - Attend or read proceedings of national professional and academic conferences



- Read books, academic journals, relevant blogs
- Conduct Internet searches
- Stay abreast of contemporary “hot topic” issues
- Identify the target audience and stakeholders
 - Be as specific as possible
 - Keep in mind the project’s long-term goal (e.g., “to change the world”), and work in phases to achieve it
 - Try (as much as possible) not to make modifications to the audience throughout the course of the project
 - Think out of the box about potential stakeholders
- Craft a compelling core message that succinctly lays out the project vision and impact
 - Begin fundraising around that message even before the project officially begins
- Create working documents with the understanding that these documents will be continuously revised throughout the course of the project
- Reserve venues as far in advance as possible

Sample Document

- 1-10 Conference Pre-Planning
- It’s never too early to begin fundraising

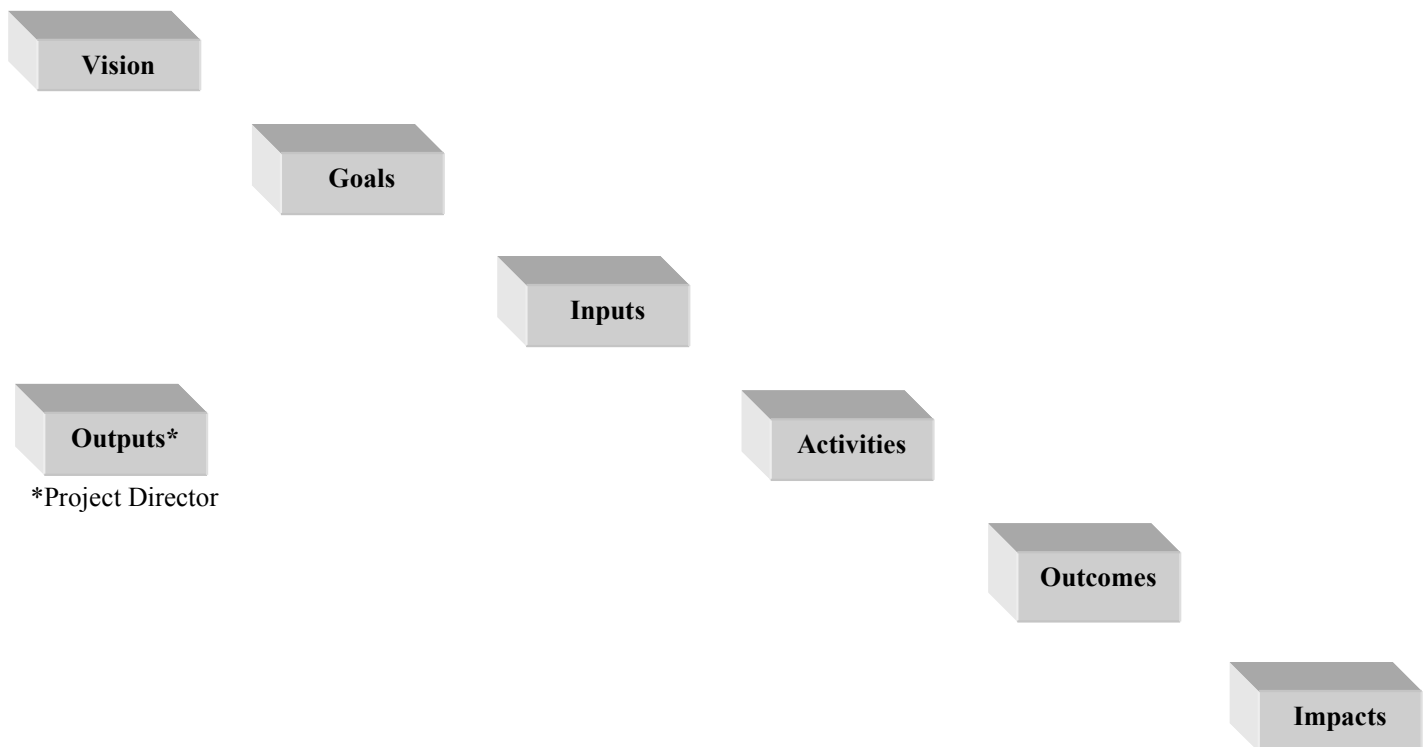
Sample Documents

- 1-2 Project Vision, Objectives, Methodology
- 1-3 Budget with Revenue and Cost Estimates
- 1-4 Development Plan
- 1-5 Education Plan
- 1-6 National Conference Marketing/Communications Plan
- 1-7 Project Timeline
- 1-8 Organizational Chart
- 1-9 Educator Evaluation Design



PROJECT LOGIC MODEL **(Final Draft as of August 2009)**

A project logic model is a powerful and practical tool used by many managers to ensure that the sequence of activities is tracking in accordance with the project vision. It makes transparent the reasoning behind the project, which is especially helpful in collaborations. It sends a clear message to all stakeholders that a successful project derives from thoughtful consideration and requires input from a range of voices, perspectives, and interests. It provides a visual map that connects the project vision, goals, inputs, activities, outputs, and outcomes to impacts.



Vision: The vision expresses the mental imagery that guides all thinking and behavior.

- A project vision is both meaningful and compelling to stakeholders and represents a desire to change something in the external environment.
- The project vision should be periodically discussed and examined to determine whether and to what extent project goals, inputs, activities, outcomes, and impacts remain congruent with previously expressed intentions. This is especially critical as conditions change during the course of the project.

Goals: Goals give precise, measurable expression to what the project will accomplish.

- Especially with collaborations, project goals should be discussed with as many stakeholders as possible to increase the likelihood that goals are realistic.
- Ideally, project goals will identify specific targets—individuals, communities, groups, conditions, or circumstances—that the project will change.
- Project goals must be linked to specific project activities and outcomes.

Inputs: Inputs are the resources necessary for the project.

- Inputs fall into various categories:
 - People (funders, staff of collaborating institutions, place-based community members, scholars, practitioners);
 - Ideas (books, scholarship, dialogues);
 - Practices (past collaborative projects, like-minded work).
- A key task is to identify which inputs are available to the project.

Activities: Activities are what happens.

- Activities manifest in a variety of ways:
 - Products (promotional materials, educational curricula);
 - Events (dinners, meetings, gallery viewings, school-based endeavors, working group meetings);
 - Services (professional development, training, counseling, seminars);

Outputs: Outputs are benchmarks that indicate progress.

- Outputs result from all aspects of the project.
- The size, scope, cost, and condition of the service, activity, or product delivered—and to whom—characterize outputs:
 - Number and selection of collaborating institutions and/or communities, conferences, meetings, museum gallery visitors, and school-based endeavors;
 - Selection of institutional staff for participation in the project;
 - Hours and resources consumed completing tasks that culminate in project activities;
 - Number of participants at a project activity;
 - Number of educators trained and the educational materials they develop and distribute;
 - Timing and distribution of resources to collaborating institutions.
- Outputs must be tracked, managed, and facilitated by a project director.

**PROJECT VISION, CONCEPTUAL FRAMEWORK,
ANCHOR INSTITUTIONS, OBJECTIVES, OUTCOMES, AND
METHODOLOGY**
(Working Draft as of September 2006)

VISION:

To educate Americans about the importance of civil rights and social justice by using lessons from our nation's history as case studies that facilitate dialogue and action impacting our country's present and future.

PROJECT CONCEPTUAL FRAMEWORK:

Enduring Communities: The Japanese American Experience in Arizona, Colorado, New Mexico, Texas, and Utah is a three-year initiative in which the Japanese American National Museum collaborates with educators, communities, and students in the five states to develop curriculum that examines civil rights and diversity issues in historical and contemporary contexts. This project is modeled after a recently completed multi-year partnership entitled *Life Interrupted: The Japanese American Experience in World War II Arkansas*.

The situation of Japanese American populations in these states during World War II—in which some lived “free” and others were incarcerated by executive order behind barbed wire—affords the opportunity to explore the contradictions and racism inherent in how we have defined citizenship and dealt with diversity.

These stories provide a compelling point from which to consider more broadly the experiences of other regional communities during World War II and beyond. In this way, the collaboration will generate materials and dialogue that reveal how the diverse realities of American communities have challenged and shaped this country's definitions of citizenship, patriotism, and democracy.

ANCHOR INSTITUTIONS:

Arizona State University, Asian Pacific American Studies Program
University of Colorado, Boulder
University of New Mexico
Institute of Texan Cultures
Davis School District (Utah)

MAJOR FUNDER:

Institute of Museum and Library Services

#1: Internal Planning Preceding the Collaboration

Sample 1-2: Project Vision,
Objectives, Methodology

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(Working Draft as of September 2006)

	OBJECTIVES	OUTCOMES	METHODOLOGY
1.	COLLABORATIONS: To create meaningful linkages between a nationwide network of interested parties in order to further the dialogue and ongoing education about the situation of Japanese American populations in these states and other related issues.	<ul style="list-style-type: none"> National conference Educational resources 	<ul style="list-style-type: none"> Anchor institutions Web site Community outreach PR/Marketing Advisory committees (scholars, educators, community, camp and camp preservation)
2.	EDUCATIONAL RESOURCES: To create an education plan for classroom-based materials and provide educational resources that can be utilized in the five states beyond the conclusion of the Enduring Communities project.	<ul style="list-style-type: none"> State-specific curriculum Video oral histories recorded by students National Summer Institute for Educators Education evaluation 	<ul style="list-style-type: none"> Anchor institutions Education advisors Master teachers Connections with state-wide education officials Field testing Local repositories to house oral histories collected by students Web site Organizational Concepts, evaluator Distribution through existing networks
3.	NATIONAL CONFERENCE, July 3-6, 2008, Denver, Colorado: To present a national conference that makes connections between the Japanese American experience during WWII and examines civil rights and diversity issues in historical and contemporary contexts.	<ul style="list-style-type: none"> Conference Conference attendee evaluation 	<ul style="list-style-type: none"> Anchor institutions Community advisors Scholar advisors Civil rights institutions and organizations Camp advisory and camp preservation groups PR/Marketing Web site
4.	FIELD GUIDE and DVD: To document and share with practitioners in the field the process of collaboration between institutional partners (museum, universities, school districts).	<ul style="list-style-type: none"> <i>Field Guide to Collaborations</i> (working title) 	<ul style="list-style-type: none"> Evaluation consultant Publisher
5.	EVALUATION: To measure the impact of the partnerships and resulting programming.	<ul style="list-style-type: none"> Partnership evaluation Education evaluation Conference evaluation 	<ul style="list-style-type: none"> Evaluation consultants IMLS mandated outcome-based evaluation workshops

NATIONAL CONFERENCE BUDGET
(Working Draft for FY07-FY09)

Estimated Revenue

<u>All-In Fees</u>	<u># of People</u>	<u>Registration Fees</u>				<u>Blended Revenue</u> <u>(Early Bird/Reg)</u>	<u>Revenue</u>	<u>Sub-</u> <u>Totals</u>
		<u>Early Bird</u> <u>Rate</u>	<u>% Estimated at</u> <u>Early Bird</u>	<u>Regular</u> <u>Rate</u>	<u>% Estimated at</u> <u>Regular</u>			
Members		\$		\$		\$	\$	
Non-Members		\$		\$		\$	\$	
Educators		\$		\$		\$	\$	
Students		\$		\$		\$	\$	
Children under 5 yrs old		\$		\$		\$	\$	
Sponsored Staff		\$				\$	\$	
Sub-Total All-In	0							\$

<u>A La Carte Fees</u>	<u># of People</u>	<u>Early Bird</u> <u>Rate</u>	<u>% Estimated at</u> <u>Early Bird</u>	<u>Regular</u> <u>Rate</u>	<u>% Estimated at</u> <u>Regular</u>	<u>Blended Revenue</u> <u>(Early Bird/Reg)</u>	<u>Revenue</u>
Conf Reg only - member		\$		\$			\$
Conf Reg only - non-member		\$		\$			\$
Conf Reg only - educator		\$		\$			\$
Conf Reg only - student		\$		\$			\$
Conf Reg only - under 5 yrs old		\$		\$			\$
Lunch		\$		\$			\$
Dinner		\$		\$			\$
Amache Camp Trip		\$		\$			\$
Lunch only (no registration)		\$		\$			\$
Dinner only (no registration)		\$		\$			\$
Speakers: conf reg only		\$		\$			\$
Speakers: comped lunch		\$		\$			\$
Speakers: comped dinner		\$		\$			\$

TOTAL REGISTERED 0 \$

Community Marketplace participation fees (\$ * # participants) \$

Grants

Government grant (direct costs, salaries/fringe, indirect costs) \$
 Foundation grant \$
 Corporate grant \$
 Gift in honor of \$
 Grants - pending \$

Contributions from Individuals

Family Foundation \$
 Individual Sponsor \$
 Foundation - pending \$
 Individual Sponsor - pending \$

TOTAL ESTIMATED REVENUE \$

Amount

\$
 \$
 \$
 \$

[illegible][illegible]

\$\$\$

 \$

EXCESS FUNDS/(FUNDS NEEDED)	\$
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FY07 DEVELOPMENT PLAN
(Working Draft as of November 3, 2006)

Enduring Communities Project Components:

- Curricula
- National Conference
- Field guide with Project DVD

Fundraising Revenue Goal: Determine upfront what revenue/funds are needed at critical project phases and what is the project revenue goal (e.g., raise \$X net, \$XX to cover expenses, etc.)

Individual Giving

Strategies:

Key pitch/message – need monies to bring students/teachers to the conference particularly from within the five project states

- Presentations to key community groups and like-minded organizations
- Receptions at people's homes to share the project goals
- Major gifts, with possibility of future endowment
- Leverage current donor base and contacts
- Create regional advisory committees and key leadership to serve as project advocates
- Use advertising and other marketing activities as added incentive for promotion and visibility

Research:

- Determine individual giving potential and preferred giving styles
- Identify and rank major donors based upon giving history, strength of contacts, philanthropic interests, and recognition preferences
- Integrate regional advisory committee and key leadership to help strengthen individual relationships and project credibility
- Evaluate communication outreach required for each region before finalizing communication plan

Goals:

- Raise enough funds to bring at 5-10 students/educators to national conference
- One major funder per state
- Enlist support and participation of at least 25% of current donor base (subject to project fundraising schedule and revenue goals)
- Donor base should include new, younger, diverse donors

Institutional Giving

Strategies:

- Create prospect list of corporations/foundations whose philanthropic interest match project goals
- Leverage accessibility by corporations/foundations to project target audience
- Develop panel theme and panelists that would allow corporations/foundation to present their work/product and executives as key spokespersons
- Include representatives from corporations/foundations on advisory committee early on and to ensure diversity on regional committees
- Use advertising and other marketing activities as added incentive for promotion and visibility

Research:

- Identify corporations/foundations who want visibility and access to target audience
- Review list of corporations/foundations with Board members, regional advisory committee, key leadership, and other regional influential people to determine who best to make the ask
- Understand what are corporations/foundations current and prospective audiences

Goals:

- Enhance existing relationships with new opportunities and visibility
- Create new relationships for long term partnerships
- Develop strong relationship for introduction to future corporate/foundation relationships

EDUCATION PLAN
(Working Draft as of October 2005)

VISION:

To educate Americans about the importance of civil rights and social justice by using lessons from our nation's history as case studies that facilitate dialogue and action impacting our country's present and future.

SHORT-TERM GOALS FOR PROJECT EDUCATORS:

- (1) Become familiar with the Japanese American National Museum.
- (2) Gain resources that prompt the expansion of curriculum content to include more perspectives and stories to further problematize history.
- (3) Acquire increased tools and ideas on the following: curriculum writing using essential questions, student video oral histories, incorporating primary sources into curriculum writing, building a learning community.
- (4) Create and pilot standards-based curriculum that explores an essential question.

LONG-TERM GOALS FOR PROJECT EDUCATORS:

- (1) Understand that the role of American pluralism (including ethnicity and cultural diversity) is foundational to American democracy.
- (2) Participate in a learning community of professionals, both geographically proximal and distant, that will learn together, create lessons together, share/discuss the results of their work, and be inspired to become lifelong practitioners of democracy within a community of learners.

DELIVERABLES:

- Standards-based curriculum (at least 1 curricular unit/state)
 - o Based on essential questions
 - o Illuminates Japanese American experience in the specific state
 - o Tie together historic and contemporary issues
 - o Incorporation of primary source documents
 - o Standards-based
 - o Permissions cleared for posting on the National Museum's Web site
- Student-produced oral histories supplementing the curriculum

DEVELOPMENT PROCESS:

- Understanding that the teacher teams best understand their students and the educational climate within their states
- Education Point Person will assemble a team of approximately four teachers to write curriculum
 - o Experience with and interest in curriculum writing
 - o Grade level taught
 - o Content knowledge about the Japanese American experience
 - o Geographic location within state
 - o "Connectors" to other teachers, organizations within state
 - o Ability to work well with the team, as well as independently
- Teams of teachers from each state attend the National Institute for Educators at the Japanese American National Museum in July 2006 and again in July 2007 (travel expenses and stipends provided)

- July 2006 Institute will provide content knowledge about the Japanese American experience, introduce concept of lesson sharing and create learning communities
- Teams will continue to meet, problem solve, share ideas between the 2006 and the 2007 Institute; unit plans are drafted
- July 2007 Institute will provide safe space for teams to share their unit with colleagues from other states; receive feedback; strengthen and revise
- Teacher teams will identify and engage young people to produce media pieces that supplement the curriculum materials
 - Expertise with media equipment and related software
 - Content knowledge about Japanese American experience
 - Ability to work well with the team, as well as independently
 - Geographic location within state
- General Timeline
 - Final units and student media pieces are due Spring 2008 to the Japanese American National Museum (in electronic format) for time to edit, clear copyright permissions, graphic designer, and posting on the Web

ASSESSMENT:

- Constructive feedback from peers
 - At team meetings within each state
 - Lesson sharing at the 2007 National Institute
- Education Evaluator (contract) will work with teacher teams to set up and conduct field testing within each state to try out and provide constructive feedback about the curriculum before it is finalized
 - Series of surveys
 - Sample student work to document process
 - Once feedback is received from field testers, necessary adjustments will be incorporated

SUPPLEMENTAL MATERIALS:

- DVD of the student media pieces
- Scholar essays and timelines about the Japanese American experience in the five states
- Map of the confinement sites
- Selected bibliography

DISTRIBUTION:

- Electronic copies available for download in Fall 2008 (free of charge)
- Teacher teams (and students) to preview curriculum at the 2007 National Conference hosted by the National Museum
- Presentations at local, regional, national conferences
- Article in *The Social Studies*, the magazine for the National Council for the Social Studies

FUNDING:

- Institute of Museum and Library Services
- Other funders currently being sought

NATIONAL CONFERENCE MARKETING/COMMUNICATIONS PLAN
(Working Draft as of FY07)

GOALS

- Enhance national awareness and visibility of the National Museum's leadership role as the caretaker of the Japanese American experience.
- Create awareness and visibility of the *Enduring Communities* project goals, and also the relevance today for the National Conference.
- Generate interest and participation in the National Conference.
- Support the National Museum's institutional Marketing/Communications Plan and Development strategies.

STRATEGIES

Pre-conference: create initial buzz, word-of-mouth interest in conference registration through community gatherings, outreach/meetings with key leadership, and distribution of conference materials.

Marketing Activities

Community Outreach

Develop clear, concise conference promotional piece to market conference highlights and solicit participants.

- For donor base, a mailing is recommended; for prospects in each region seek electronic distribution unless budget allows for mailing.
- Utilize existing communication methods for each region.
- Determine which method will be most time and cost effective; assess based upon which region you need the most participation.

E-mail Communications

Develop e-mail schedule, format, required links, and messaging (action-oriented).

- Determine promotion/incentives for early registration with "count down" approach to key registration deadlines, e.g. Six weeks to go, Five weeks to go, etc.
- Create messages and include pitch from key spokespersons to each audience strands (e.g., residents from conference venue, donors, educators, youth/students, families, sponsor prospects, etc.)
- Message tone should be appropriate and impactful for each audience strand, e.g., "Have lunch with (notable name) at the national conference."
- Content/message should be succinct and consistent to ensure messages are read and an immediate and appropriate response can be given.
- Establish sufficient staff and other resources to create and send messages, and respond to any e-mail questions and/or request for more information.

Note: since the inception of the *Enduring Communities* project, the explosion of social media presents new, cost-effective ways to market and outreach to target

audiences. However, due diligence must be done to determine which methods are the most appropriate and viable within your own institution.

Community Presentations

As a nonprofit supported by individuals and community organizations, outreach and the buzz from “word-of-mouth” promotion is key to overall success of the National Conference, the project, and the long-term development goals of the institution.

- Determine with Development staff, markets important to short and long term fundraising goals.
- Establish calendar of museum staff/Board/volunteer trips to key markets.
- Identify which community groups require separate presentations or which groups could be done collectively.
- Determine speakers and hosts as well as talking points and key messaging.
- Distribute appropriate materials including institutional promotional materials.
- Assess the advance preparation needed by staff, regional advisory committee, and key leadership to solicit desired quality and quantity of attendees.
- Consider which individuals or community partnerships needed to lend credibility to the conference and help increase interest; if desiring certain conference registrants then will need to invite those who can help draw them to presentations.

Media sponsorships

Secure media sponsors in regional and national media in radio, TV, and print.

- Identify desired media outlets in both mainstream, community, or other specific outlets (e.g., ethnic, cultural, educational, etc.)
- Create media sponsorship package (pitch should include enhanced sponsor visibility to target audience and other conference sponsors).
- Review media contacts and relationships through Board, regional advisory committee, etc.
- Consider opportunities as conference MC, panelists, first interviews by media reporters.
- Discuss access to PSA or other on air or print mentions/features.
- Keep all sponsors update on new sponsors/partners secured.

Media Outreach

Generate strong media coverage in regional and national media in radio, TV, and print.

- Develop media list for both regional and national markets include own contacts to each media, audience, key reporters, potential feature spots, etc.
- Leverage media contacts and relationships with institution’s current contacts, Board, regional advisory committee, and other partnerships.
- Maintain strong focus on community and regional media to help support Development activities and goals.
- Set-up press release schedule for both overall conference updates/news as well as regional highlights. Post releases to web site.
- If possible, work with local media consultants/partners (in-kind) to do follow-up and be the local liaison.
- Circulate electronic releases to Board, staff, donors, registrants, volunteers, partners, etc.

- Create web site media page and resources (photos, releases, project info, etc.)
- Determine which pitch stories are appropriate for each region and national outlets.

Advertising

Develop ad schedule and placement based upon budget resources and target audience strands.

- Research community papers and in-kind radio/TV spots.
- If budget is limited, select key conference deadline dates to promote with specific message. (e.g. Last chance to register for early-bird rates!)
- Include donors and media sponsors on ad for added incentive for sponsor procurement.

Donor Communications

Maintain periodic communication with donors about conference highlights and project impact.

- Include in donor communications/publications with key highlights – save the date, early-bird registration, keynote/speaker highlights, program/activities update, etc., especially if any exclusive member/donor benefit.
- Use e-mails for general highlights (include important links to project/other web sites).
- Be sure to include acknowledgments to sponsors, partners, or key individuals confirmed. Be clear about why such support is significant to the project especially if beyond financial support. Make sure the Board/staff is aware of the major sponsorship activity for their own networking purposes.
- Review all communications to make sure project goals and impact are clear, concise, and consistent.

Conference Coverage: use media coverage to educate the general audience about the WWII Japanese American experience and increase awareness of the museum's leadership role nationally.

Media Relations

Press Kit

- Press kits should include institution overview, conference overview w/ goals clearly outlined and key highlights/speakers, list of key spokespersons for both conference and the project, venue information, photos, updated sponsors, and list of other resources for possible side stories.
- Create hard copy and online version of conference press kits with institutional and regional contacts. Determine dissemination of kits by mail or e-mail to target media contacts, affiliated and freelance reporters, TV (cable/local) stations and shows, etc.
- Formalize follow-up communication activities, special media events, etc.

Spokespeople

- Determine whom could best represent and speak on behalf of the institution (either staff, Board, volunteers, key individuals from each region) about the conference and project.
- If conference speakers, obtain title/themes of keynote speeches.
- Confirm spokespeople – availability to speak to media, get head shots, bios, topic of keynote, conference travel schedules, etc. and assess which media outlet would want have interest to feature and/or interview.
- Determine story ideas and where to pitch them.

Conference Documentation

- Video/photography documentation of key session, events, and interviews as conference set-up and other behind-the-scene planning.
- Conduct interviews with conference attendees before, during, and after to get record of impact of conference programming, what they learned, etc.
- If possible, set-up live clips or taped clips on web sites as well online community chats or discussion boards.

Post Conference: leverage conference to support institutional communications and development plans.

Communications Plan

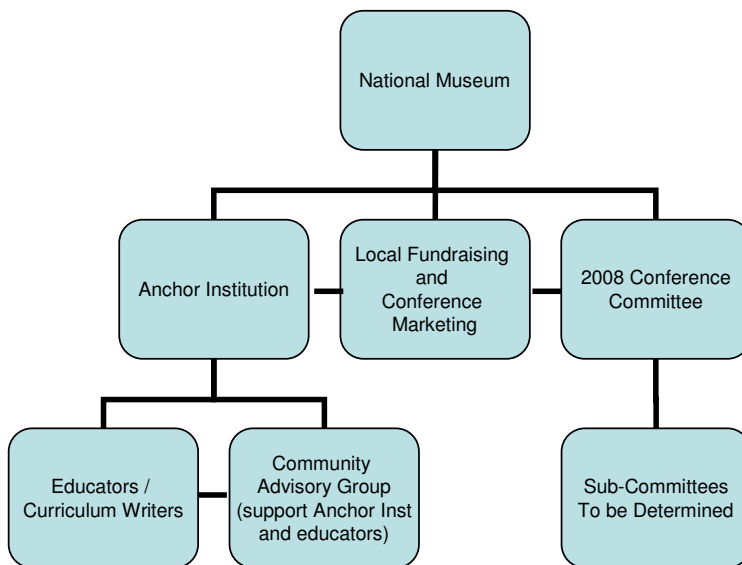
- Coordinate with Development Plan to update donors on conference success/impact – who would be good “cheerleader” to engage new donors.
- Identify which markets (due to high donor support/interest) need thank you ads, acknowledgment mailing, or even Board personal outreach.
- Incorporate conference success/impact into broader institutional goals and objectives (e.g. use in appeals, publications, e-newsletters, etc.)
- Determine need for post-conference activities in key regions (thank you reception, calls, meetings, etc.)
- Establish what additional follow-up is needed to ensure continued support of project and connection to the institutional goals.

Media Release

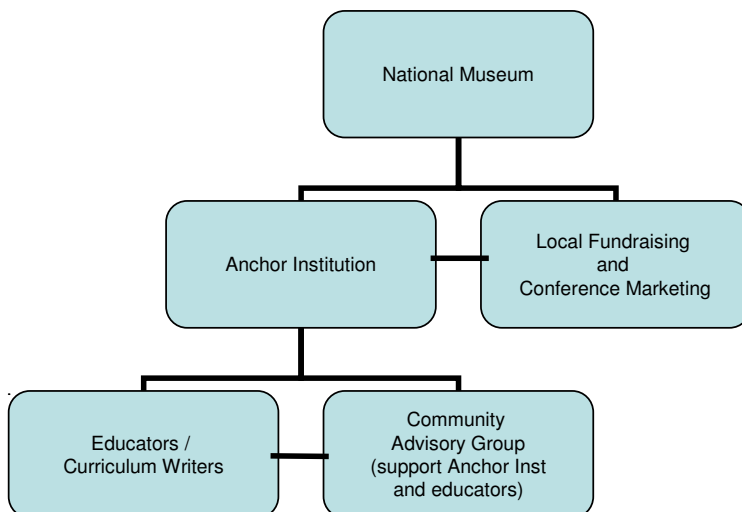
- Send final release on impact and success of national conference, include photos in case only photo is run.
- Be sure to include strong testimonials. If feasible, send separate releases per region with testimonials/photos from that region.

ORGANIZATIONAL CHART
(Working Draft as of October 2006)

Proposed for Colorado



Proposed for Arizona, New Mexico, Texas, and Utah



Enduring Communities

EDUCATOR EVALUATION DESIGN
Final Draft as of October 6, 2006

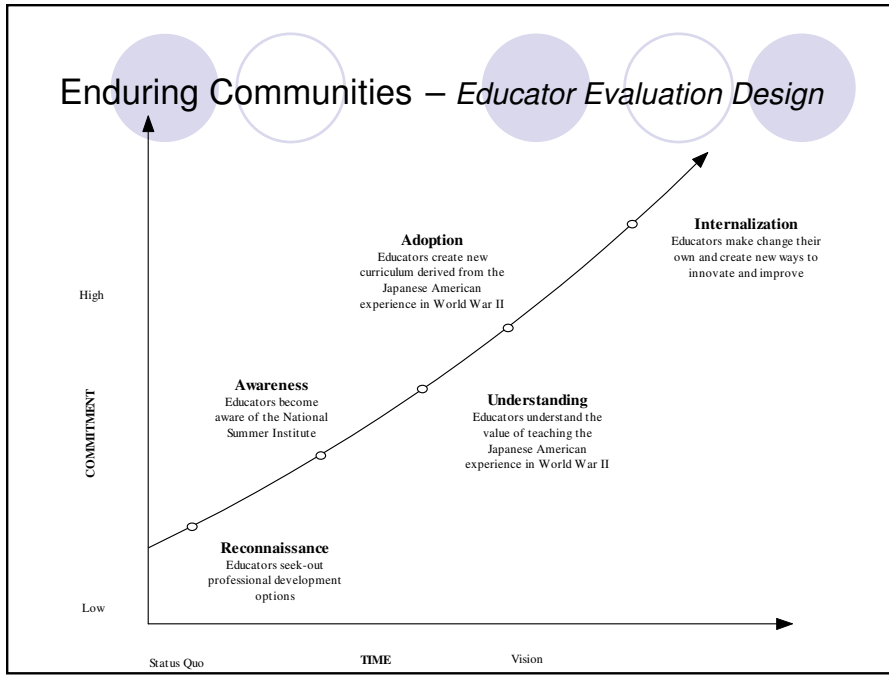
Presented by Organizational Concepts

Enduring Communities – *Educator Evaluation Design*

- Characteristics of in-service professional development that affects teaching practice:

- Active learning
- Advanced thinking
- Coherence
- Collective participation
- Content
- Sound pedagogy

Birman, B., Desimone, Garet, M. & Porter, A. (2000)




Enduring Communities – Educator Evaluation Design

Social Network Analysis

- Studies relationships within the context of social situations
- Focuses on relational data and its value
- Derives from the behavior of relationships among actors
- Cannot be measured by a single statistic

Durland, Maryann M. & Fredericks, Kimberly A. (2005)



Enduring Communities – *Educator Evaluation Design*

References

- Birman, B., Desimone, Garet, M. & Porter, A. (2000) *Designing Professional Development that Works*. Educational Leadership, 57(8), 28-33.
- Durland, Maryann M. & Fredericks, Kimberly A. (2005) *Social Network Analysis in Program Evaluation*. New Directions in Evaluation, 107, Fall 2005.
- Norland, Emma & Somers, Cindy (2005). *Evaluating Nonformal Education Programs and Settings*. New Directions in Evaluation, 108, Winter 2005.

NATIONAL CONFERENCE PRE-PLANNING (Final Draft as of September 2008)

Location

- Will your intended audience want to come to this city for a conference?
- Are there enough attractions (cultural, sporting, entertainment, etc.) outside of the conference to attract additional attendees – spouses, partners, and children?
- How convenient are the transportation systems?
- Will hotel/conference facilities meet your needs (ballroom capacity, number and size of breakout rooms, food requirements, number of sleeping rooms, etc.)?

Dates

- Are there convention “dead” times during the year when hotels are hurting for business? Possible advantage to negotiate better pricing and additional concessions.
- What are the weather conditions around the time of possible conference dates?
- If young people are to attend, when are they on vacation?
- Convention cities are booked several years in advance - start planning as early as possible.

Registration

- To establish registration deadlines, use the hotel dates for minimum sleeping room guarantees to be met as a starting point and work backwards to set the dates for deadlines.
- If you are a membership organization, consider offering a registration discount if a new membership is included with the registration.
- Offer an “early bird” registration with a significant discount compared to the regular registration rate with a deadline that is # months before the end of the regular registration period. This should provide an indication whether you are on track to meet the expected attendance numbers before the regular registration closes. If the registration numbers are falling short of expectations, there will be enough time to conduct additional marketing and/or adjust the conference planning details.
- Be sure to request guest information related to special accommodations, such as food allergies, dietary requirements, hearing impaired equipment, sign language interpreters, etc.
- Establish a policy, deadline, and procedure for registration refunds.
- Pay special attention to conference speakers and VIP's. Are they required to register or will you complete their registration for them? Also, establish a separate location for speakers within the registration area to ensure honorarium checks are securely handled and any questions or special requests are quickly handled. Assign trusted staff/volunteers to be speaker hosts to greet them when they arrive, handle any special requests, and ensure they are in position well in advance of they're speaking engagement.



Convention and Visitors Bureau

- Build a strong relationship the city's Convention and Visitors Bureau staff. They can provide information and advice on activities, special events, restaurants, free maps, and brochures.

Hotel

- Are there enough meeting rooms and sleeping rooms available at the hotel you are considering? It is always easier to manage the overall conference if all of the activities and attendees are located at the same location. When negotiating the number of sleeping rooms during the actual conference dates, ensure that your numbers are conservative. Also, ensure that enough sleeping rooms are available before and after the conference if special events related to the conference are planned. The agreed upon number of sleeping rooms will be incorporated into the contract as a guarantee. If the guaranteed number of sleeping rooms is not met, a penalty fee will be assessed.
- Is the ballroom large enough for the maximum number of people expected? Is the space flexible to reduce the size of the room if the actual attendance numbers are lower? If the number of attendees exceeds the ballroom capacity, is there another alternative available (larger room at a nearby convention center)? Do groups using the ballroom before and after your conference have similar set-ups (stage, pipe and drapes, seating, audio-visual)? If yes, can the ballroom can be left in tack to split the set-up/breakdown expenses with the other groups?
- Will the food and beverage selections meet your needs? When negotiating the food and beverage guarantee, conservatively estimate the number of attendees expected, number of banquets, and other meals/beverages for the entire conference. This dollar figure will be incorporated into the contract as a guarantee. If the dollar figure is not met, a penalty fee will be assessed. The food and beverage guarantee excludes the service charge fee and taxes, so it is important to add these additional expenses to your budget figures.
- Will the audio-visual support meet your needs in the ballroom and meeting rooms? Audio-visual prices at hotels are usually very expensive. Ask if conference speakers can bring in their own audio-visual equipment. If the hotel will allow this, they will usually tell you that they cannot provide support if the equipment does not work. Also, ask if they will provide discount rates for 501(c)3 non-profit organizations.
- Will security be needed for VIP's, exhibits, etc.? Does the hotel have security staff or will it be contracted?
- If you do not have an established credit line with the hotel, they will usually require a cash deposit by a designated date. If you have used the hotel chain in the past two years for any major event, be sure to provide this information to assist in establishing a line of credit.
- Before a contract is signed, be sure to build a strong relationship with your Sales/Marketing contact, Catering/Event Manager, and Audio-Visual contact. Also, meet the head of Sales/Marketing, as well as the General Manager, if possible. Be sure you are comfortable that this team will meet your expectations and that they are aware that you are a 501(c)3 non-profit organization and working within a limited budget. Ask them to help you find ways to stay within your budget; and, do they provide discounts for non-profits.

