



Joining Forces For Women Veterans

Summit Toolkit

Section V: Event Planning Guide

This section will provide detailed logistical and administrative instructions for the planning of your event. These “nuts and bolts” details of how to organize your Summit include:

- A. Agenda/Themes (pp. 1-2)
- B. Advisory Role Committee (pp. 2-3)
- C. Board of Trustee Involvement (p. 3)
- D. Federal, State and Local Government Support (p. 3)
- E. Sponsors, Partners and Participants (pp. 4-7)
- F. Logistical Planning (pp. 7-11)

Sample Attachments:

- 1. Budget Planning Sheet (pp. 12-13)
- 2. Logistics Planning Checklist (pp. 14-16)
- 3. Pre-Summit Survey (pp. 17-19)
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- 6. Planning Team Feedback Form (pp. 23-24)

A.) Agenda/Themes

Decide Size and Scope of your Summit

Defining a clear set of goals and purpose for your Summit will be the critical first step to lay the foundation for your planning. For example, is one of the goals is to bring together diverse sectors of the community to discuss issues critical to women veterans? If so, you are likely looking at a larger event that may involve convening a wide range of stakeholders, including policymakers, employers, nonprofit organizations, and the media. Alternatively, if you simply want to begin a workplace discussion, start a women veteran’s [affinity networking](#) group, or begin a [women veteran mentorship program](#), a brown-bag luncheon (or series of luncheons) may suffice. (To learn more about the

value of affinity groups for women veterans, please see the Employment and Careers Issue Brief in Section II of this toolkit. For details on mentorship programs, see the Mentorship Issue Brief, also in Section II.) This guide will help you coordinate the logistics of your meeting, big or small, and provide you with direction on determining the content of your discussion. The following will assist you in defining the issues that are important to those around you and help you define the goals and purpose of your Summit.

Define the Theme and Issues

The issues related to women veterans are broad and complex. Think about the key areas that would be most significant to educating and involving your audience to achieve the greatest impact. To help you determine which issues you will discuss at your Summit:

- 1.) Review the Issue Briefs contained in this toolkit (Section II) and the Summit Report (Section III). Keep in mind that the topics are broad and touch on a number of issues, and decide which will have the most impact for your attendees.
- 2.) Talk to some of the local stakeholders (women veterans, veteran service organizations, employers, employees, community organizations, government agencies) about the issues you want to discuss at your Summit. What are their concerns? What would they like to speak and learn about at a Summit?
- 3.) If your focus is on the workplace, survey your co-workers/employees to find out which issues matter most. Distribute a [women veteran's questionnaire](#) to learn more about the women veterans in your organization. Are they interested in starting a women veterans' [affinity networking](#) group? You can conduct an informal survey (water-cooler discussions) or an actual survey. (See the Discussion Guide in Section II of this toolkit for a series of questions by topic.) There are several on-line tools that are user-friendly and/or free (i.e. www.SurveyMonkey.com).

Outline the Agenda: Based on the feedback you receive, put together an agenda for your workplace discussion or larger Summit event ([click here for agenda from Inaugural Summit](#)). For a half-day event, it is best to choose two topics and leave time for interactive audience discussion of solutions/opportunities. Be sure to balance panel discussions and stand-alone speeches, and build in time for question-and-answer sessions to allow for audience participation and feedback.

B.) Advisory Committee Role

Incorporate representatives of all the key stakeholders in an Advisory Committee. The role of the Advisory Committee is to lend balanced, issue-specific expertise to your discussion, as well as to guide your decision-making with regard to the substance of the Summit. [Click here](#) for a list of BPW Foundation's Women Joining Forces Advisory Council Members.

As you consider members for your Advisory Committee, keep in mind that both employees and employers benefit from the BPW Foundation’s experience and unique role as a neutral convener. Include policymakers, community, and educational organizations in your Advisory Committee, so all of the relevant stakeholders can come together to create collaborative solutions to the problems facing women veterans.

Examples of Advisory Committee duties may include review/approval of agenda, themes, and keynote speakers. Advisory Committee members can also lend their expertise to subject-matter hand-outs/issue briefs/discussion guides, and may assist in the recruiting of appropriate keynote and panel speakers. Beyond the Summit, you may wish to extend the Advisory Committee’s role to include guidance and direction for related projects coming out of your meeting. For example, after the Inaugural Summit, BPW Foundation launched a joint [mentoring project](#) for women veterans, that the WJF Advisory Council is providing guidance on.

C.) Board of Trustee Involvement

If your organization has a [Board of Trustees](#), get them involved in overall program planning (securing speakers, sponsors) and utilize their talents on the day of the event. Board members might serve as moderators or keynote speakers, and they can be assigned to “host” specific speakers or sponsors, greeting them as they arrive at the Summit, sitting with them at lunch or breakfast, etc. This adds a personal touch to the event, and attendees will appreciate the Board’s outreach in recognizing the contribution of the guest in supporting women veterans and beginning to build a relationship with them on behalf of the organization.

If your focus is on a workplace discussion, starting an affinity group, or beginning a mentorship program, be sure to share this information with your Board and invite them to participate. This can be especially useful if you have veterans on the Board.

D.) Federal, State and Local Government Support

Congressional awareness and support is extremely valuable at all levels of women veterans’ issues. The support of your local congressman/senator contributes to the goal of educating and raising awareness among local policymakers of issues facing their constituent women veterans. Find out if any of your state representatives are on the [House Committee of Veteran’s Affairs](#) or [Senate Committee on Veterans Affairs](#), as your Summit will have particular relevance to their work. Although it may not be possible to have a Congressman or Senator speak at your Summit, provide them with details (including partners, sponsors and speakers) and reinforce the importance of this event. Ask them to send a staff representative and [a letter of welcome and support](#) that you can include in the event information packet. In addition to federal legislators, you may want to reach out to state and local representatives.

BPW Foundation regularly monitors and updates information on public policy and legislation that impacts women veterans. For a public policy update, please contact BPW Foundation for the latest issue of *Policy Watch*, or visit the BPW Foundation [Public Policy webpage](#) and [Advocacy Center](#).

E.) Sponsors, Partners and Participants

Sponsorships

Sponsors play a critical role in your Summit, not only from a financial standpoint but by showcasing the specific contributions the corporate community can make to support women veterans. For example, sponsoring companies may create an [advertorial](#) to promote recruiting, hiring, or supporting women veterans. Click [here](#) to see advertorials from the Inaugural Summit included in our printed program book.

Consider full financial sponsorships as well as in-kind sponsors (i.e. those who provide free or heavily-reduced rates for their services). It's a great way to support small businesses that may not otherwise be able to afford to be a sponsor (and gives them visibility/marketing opportunity). This is also a great opportunity to showcase women-owned and/or veteran-owned businesses within your community. Examples of reduced-fee and in-kind sponsorships obtained for the Inaugural Summit include photography services, catering and hotel accommodations.

Based on your budget, it is important to decide on the [value proposition](#), [level of sponsorships](#) and corresponding benefits of each level. For example, a potential benefit is having a representative from the funder attend the Summit, and if they are interested, facilitate a panel discussion or roundtable. When soliciting businesses, explain that they will have the opportunity to learn first-hand the needs of women veterans.

Before asking for support, get permission. Some city, county, and state governments do not allow groups to ask for donations without first filing for a permit. You can check with your local, city, county and state comptroller's offices for more information. The most effective way to ensure that you have all the resources you need for your event is to develop a budget. A sample budget sheet is provided in **Attachment 1** to help you with this process. Keep the following tips in mind when beginning your sponsorship approaches and fundraising efforts for the Summit.

BPW Foundation Rules for Being an Effective Fund Raiser: 7 Keys to Success

1. People give to people.
2. Express your belief and commitment first.
2. Reach out to people based on their interests, not yours.
3. You have to ASK for the contribution.
4. Aim high and ask the donor to consider a specific amount.
5. "No" does not mean never.
6. Thank every donor at least 7 times.

When communicating with sponsors, try to anticipate all of the information you will need from them, as early as possible. For example, beyond invoicing them for payment, will you also need their logo for your website, event signage, or hand-outs? Are you requesting an [advertorial](#) for your program book? Are you asking them to share best practices about hiring women veterans, or to submit a [testimonial](#) from an employee?

Would you like representatives from their organization (who are attending the event) to complete the [Women Veteran Questionnaire](#)? Will one of their representatives speak at the event? If so, ask early for a bio and/or high-resolution photograph. You'll want to request this information well in advance of your event and give them plenty of time to coordinate internally to meet your submission deadline. Click here for a sample [sponsor confirmation letter](#) and [pledge form](#).

Partners

In addition to your sponsors, you may want to consider partner organizations. The role of a partner organization is to share the goal of supporting women veterans, and to symbolize and provide leadership through their organization's standing in a community. They also can help in securing sponsorships, speakers and attendees; and/or provide logistical assistance, e.g., host the event. [The Inaugural Summit](#) included three partner organizations: BPW Foundation, The McCormick Foundation, and Disabled American Veterans Charitable Service Trust.

Summary of Benefits for Sponsors/Partners:

- Find collaborative solutions to workplace issues through a community forum or brown-bag discussion.
- Connect with targeted segments of employees (women veterans, young careerists etc.) and help address specific challenges/concerns they face.
- Become a leader in the community on key women's issues.
- Partner with other employers and organizations, to learn best practices.
- Showcase your company's policies and best practices.
- Honor leaders in your company or community by introducing an "Employee of the Year" award and/or "Employer of the Year" award. ([Click here](#) for description of these awards, contained in BPW's NBWW Activity Guide, pp. 2-3.)
- Improve community and employee perception of the company's commitment to working women.
- Gain access to and credibility with the women's community/the female customer.
- Position the company or organization as an attentive and responsive participant in the community.
- Access a BPW Foundation local network and valuable insights into opinions and information.
- Gain visibility through local (and potentially national) media coverage.
- Speaking role at the Summit.
- Recognition in press releases (about the event), on the website, and logo included in program materials and summary report

Participants

Veteran Service Organizations and nonprofits that support veterans: It is critical to ensure the participation of women veterans, and the best place to start is with local [veteran service organizations \(VSOs\)](#) and the nonprofits that provide services to women veterans, as well as the VA Medical Centers, and veterans' state and county offices. They might be candidates for speaking or can recommend speakers for keynoting or panels. In particular, they should be asked to promote your Summit among women veterans. They can also help [solicit profiles](#) and [testimonials](#) of women veterans to include in your Summit program or program collateral materials.

Corporate Involvement: One of the key goals of the *Joining Forces for Women Veterans* project is to build public-private partnerships in support of women veterans. We all recognize that the government agencies, including the U.S. Departments of Defense, Veterans Affairs and with some support from the Department of Labor, play primary roles in all aspects of supporting military members and veterans. However, these agencies alone are not responsible for the successful transition of veterans to civilian life, particularly as it impacts employment and advancement in professional and personal lives. The corporate and non-profit communities must partner if women veterans are to be successful as workers and leaders in their communities.

The involvement of the corporate community in the Summit is essential. It is important for businesses to understand the incredible talent, strength and resources that women veteran employees bring to a civilian career. Click [here](#) for the Forbes article, “The Business Case for Hiring Vets,” by Susan H. Burnell, one example of the benefits of hiring veterans. As part of your research and consecutive outreach to relevant companies, discuss their experiences, interests and objectives with women veterans. This will help you to better know your audience, frame the agenda and make the Summit a more quantifiable experience for them. Consider specific careers & employment sessions, [featuring best practices](#) (employer-to-employer) and hiring/recruiting (employer-to-veteran job seeker). Highlight success stories/best practices in addition to focusing on lessons learned and replication aspects.

Speakers & Attendees: With regard to speakers and attendees at your Summit, it is critical to include a balanced mix of all of the key stakeholders: women veterans, employers, employees, community organizations, policymakers, etc.

Include local and state women veteran speakers and participants who can “share their stories” and struggles yet demonstrate their resiliency, current status, and the resources that worked for them. **Women veterans should [represent different eras of services](#), [different ethnicities](#), [different life stages](#) and [different challenges](#).** The diversity of your panelists can highlight the fact that the transition journey for women veterans is a heterogeneous experience, reminding attendees of the importance of targeted interventions for different segments of the women veteran population. The needs of a 25-year old woman veteran from Operation Iraqi Freedom, for example, differ from those of a 62-year old woman veteran who served during the Vietnam era. (For more information on this please visit the Inaugural Summit report in Section III, pp. 8-9.)

Invite businesses, government and nonprofit organization leaders in your state and local community who can make decisions, and provide needed support and access for women veterans. Examples include local representatives of the [Veterans Affairs office](#), [Small Business Administration](#), Chamber of Commerce, and the [U.S. Dept. of Labor's VETS Transition Assistance Program](#) representatives.

The size of the audience should be conducive to discussion and audience feedback (the Inaugural Summit had about 80-90 attendees). Business should be at least 30 percent of your audience as they are the ones who can make a difference in employment and stability for veterans in the labor market. It may be necessary to limit the number of representatives from each organization, in order to include a good cross representation of stakeholders (yet not make the audience too big).

Speaker preparation: In addition to providing [speaker confirmation letters](#), speakers will be looking for guidance from you on the focus and length of their remarks as well as what to prepare for interactive discussions with the other panelists and audience. Conference calls (or [webchats](#) – see Section VI) about ten days prior to the event with each panelist group enables moderators and speakers to hear what is expected of them and to go over any questions. Speakers can also coordinate their remarks (to avoid repetition). It is critical to provide clear instructions as to the specific topic they are to discuss (and how that will interact with other panelists' remarks), the length of the remarks, and whether or not their remarks will be recorded.

Government representatives as panelists should be prepared to interact with other panelists, and be knowledgeable about the panel they are presenting with, as they are often used to giving keynote or individual speeches, and may not attend the entire event. Explaining the message of those that present before them, and the message their panel is examining may assist them in better orienting their remarks as to ensure no repetition or redundancy occurs. It is also advisable to balance panel discussion with stand-alone speakers, to provide a richer mix of ideas, activities and stories. **Set and monitor time limits for all speakers.** Summit facilitator, panel moderators and staff support in the audience with timecards can ensure that speakers stay on time and on topic. **We also recommend coaching any speakers who are not experienced in public speaking.** For example, some of the women veteran speakers at the Inaugural Summit had never addressed an audience before. To help them prepare, BPW Foundation gave them guidelines for writing their presentations and helped them prepare [testimonials](#). Have inexperienced speakers arrive early to the event; so they can become familiar with the venue, and practice their remarks on the stage, at the podium, or from wherever they will be speaking. We also experienced some significant emotional reactions to the veterans' stories from other women veterans in the audience. You might consider **having a female counselor on hand at the event** to help veterans who react with such emotion in the face of their own memories and stories.

F.) Logistical Planning

It is recommended that you choose a lead coordinator and planning committee that will be responsible for the organization and planning of the event. As you begin, decide how

you can make the event itself a model for women-friendly and green practices. For example, do you want to utilize a woman-owned (and/or veteran-owned) caterer, offer green options to participants? If you say yes to these options, they can impact site selection, food choices, and the materials you produce.

Sample Planning Committee responsibilities:

- ✓ Agenda and materials (hand-outs, etc.) preparation
- ✓ Sponsorship recruitment (including preparation of sponsor letters, containing price levels and benefits of sponsorship)
- ✓ Speaker recruitment
- ✓ Budget management
- ✓ Registration
- ✓ Marketing of the event
- ✓ Date/Time Selection
- ✓ Site Selection
- ✓ Audio Visual
- ✓ Food & Beverage
- ✓ Hotel & Travel
- ✓ Photographer
- ✓ Signage
- ✓ On-Site Supplies
- ✓ Hand-Outs
- ✓ Timing/Flow of Agenda
- ✓ Thank You Letters
- ✓ Summary Report

Attachment 2 contains a chronological Logistics Planning Sheet to support your planning efforts.

Budget Management

To begin with, you will need to identify the parameters of your budget. If you're holding a simple brown-bag luncheon, this section will not apply. However, to plan a larger Summit, the first consideration logistically will be: how much can we afford? To help you identify costs, please find attached a Sample Budget Worksheet (**Attachment 1**). Create a comprehensive budget from the very beginning, and monitor and update it regularly. Keep in mind, all vendors can be approached as "in-kind" sponsors. This can be a very cost-effective approach, and can have the added bonus of increasing awareness of supporting working women among a broader community.

Registration & Invitations

As you consider your budget, decide from the very beginning whether or not you will charge a registration fee to attend, or if you can secure sufficient sponsorship money to cover expenses. Invoice sponsors immediately upon confirmation. Consider your budget and target audience when deciding how to invite potential participants. To save time and money, [e-mail invitations](#) (vs. hard-copy) may be most efficient/effective. Evites and text invitations are also well-received by tech-savvy employees. They are also considered to be "greener" than mailed invitations. However, neither is cost free and

text invitations may cost the recipient. Also, some employers and partner organizations may prefer a more formal invitation. It is helpful to partner with organizations that can provide member lists or contacts for invitations. Web-based [registration forms](#) and an RSVP date are highly recommended. Be sure to include “branch of service” on the registration form; so, it can be acknowledged at the event (with [branch of service stickers](#) on nametags).

Marketing

Create an overall Summit communications plan that details the timing of press releases, invitations, and other marketing efforts. This plan should include pre-Summit timing of invitations, marketing materials, [press releases](#), [social media](#), webcast, and [post-Summit communications](#). Think about what type/level of Program Book (if any) you want to hand out at the Summit (click [here](#) for sample). This can be a reference and education resource for your attendees as well as an excellent marketing tool, but it can also become costly and time-consuming and must be managed well in advance of the Summit. You may prefer to make the guide and other handouts available only through the event website prior to the event or distribute them at the event on memory sticks. After the Summit, in addition to [press releases](#), ideas include featuring the live [webcast](#) (if you have one) on your website; preparing a [YouTube video](#) of the Summit; putting together [hand-outs](#) capturing key quotes and photos of your event.

Date/Time Selection: When choosing a date, be sure to consider government holidays. Depending on the potential role of government officials, it could be a problem; however, if that is not a factor, it may be easier for attendees to attend. If you are planning to include federal legislators, you may also want to consider Congressional recess dates (better chances of having lawmakers back in your home state). Consider other factors beyond your control (i.e. seasonal weather, another large event being held concurrently, etc.). Check with your local Convention and Visitors Bureau and Chamber of Commerce to see if there are any other major events happening around the dates you are considering. Depending on the topics you choose, it can be advantageous to hold the event in the weeks leading up to Women’s History Month (March), Memorial or Veterans Day (may increase exposure/visibility and chance of media coverage). With regard to the duration of the Summit, a half-day timeframe is recommended (i.e. 9:00am – 1:00pm or 1:00 – 5:00pm).

Site Selection: There are several things to consider when selecting a location for your event. First consider securing free or reduced site-rental fees in exchange for sponsorship. You also want to consider proximity to public transportation and availability of parking. If you are interested in incorporating sustainable or “green” practices into your event, talk to the managers at potential sites. Many of meeting venues and hotels already incorporate green practices into their offerings; practices that you can take credit for. Green or sustainable practices include using locally grown foods, offering bulk water instead of bottles, and recycling are common examples.

When evaluating the size of a meeting room, ask whether or not it is big enough for speakers, attendees, media (if applicable), food & beverage? Is the stage or riser (where speakers will be) easily accessible and ADA compliant? How are the acoustics? If you

are having a webcast, does the room have the necessary internet connections? If you are utilizing a graphic recorder, is there room for the recordings to be displayed?

Audio Visual: Depending on the location of your Summit, keep in mind that the sound system costs may be in addition to site rental fees (i.e. microphones, projection equipment, etc.). Consider other AV options such as recording of the event, webcasting, and graphic recording, etc. The Inaugural Summit featured a graphic recording, which created a complete picture of the day's outcomes and a good basis for discussion, and was very well-received as a perfect addition to the day. (Click [here](#) to view the graphic recordings from the Inaugural Summit.)

Food & Beverage: In addition to the food and beverage needs of attendees (based on timing of program), keep in mind the importance of providing plenty of fresh water/glasses for speakers on stage. For a half-day program, one meal is recommended (i.e. breakfast or lunch depending on timing). Also, for a 4-hour program one coffee break will be necessary at half-way point.

Hotel & Travel arrangements: Budget for (and make reservations well ahead of time) any speaker hotel and travel arrangements. (Consider an in-kind sponsorship with a local hotel.) Provide a list of local hotels/parking garages for other out-of-town participants.

Photographer: Photos are exceptionally valuable not only for capturing the events of the day for your [website](#), [Facebook page](#) or newsletter, but also for sharing with sponsors and speakers afterwards as part of their thank-you notes, and/or to create [post-Summit marketing brochures/materials](#). It's important to coach photographer on key participants and any special shots you might want.

Signage: Be sure to include signs for registration, sponsors, event, etc.

On-Site supplies: On-site supplies range from folders with the meeting hand-outs, to general office supplies (pens, paper, scissors, tape, and aspirin) to all of your on-site registration materials (name badges, speaker/staff/sponsor ribbons, etc.).

Vendor Walk-Through: If you have a caterer, photographer, [graphic recorder](#), [webcast](#), or an outside AV company at your Summit, a site visit with your vendors is suggested well in advance of your event, so you can walk through the program and they can confirm any set-up requirements and/or delivery arrangements with the site facility manager.

Practice Timing & Flow of Agenda: Prior to the event, do a mock program walk-through with staff ahead of time, to practice timing, logistics. At the actual event, have your facilitator outline the day's agenda for audience at beginning of program, to make it easier for the audience to anticipate and follow the program. Ensure lights on stage aren't blinding (and so hot) and the speaker(s) can see the audience. Have a staff person sit in the front row with time cards, to help keep speakers (or panel moderators) within their allotted time limits.

Audience Participation: We recommend including a portion of the program for audience participation. This can be as simple as taking questions at the end of a panel session or speech. Or it can be a full-hour length “Solutions and Opportunities” discussion at the end of the program, to allow a substantive exchange with the audience about proposed ideas and solutions. Audience feedback will be an important component of planning your post-Summit activities/programs. Another important tool for soliciting audience feedback is distributing a pre- and post-Summit survey (see **Attachments 3-4**).

Thank you letters: In addition to sending thank you letters to speakers and sponsors, you can also include a [certificate of appreciation](#) and photographs from the event.

Summary Report: Based on your audio-visual set-up, it may be as simple as having a recording of the event transcribed for you. Regardless, you’ll want to assign a volunteer of staff member as the official note-taker that day, to capture not only the actual statements, but also the nuances in the room and unspoken atmosphere around the discussion. Having a summary report that captures key elements of the discussion, as well as the practical details (agenda, speakers, sponsors, etc.) will be an extremely valuable resource long after the Summit. Click [here](#) for Inaugural Summit Report.

Next Steps and Commitment Form: As part of your Summit follow-up, in addition to thank-you letters, a post-summit survey (**Attachment 4**), you may also want to consider sending attendees a “Next Steps and Commitment Form” (**Attachment 5**) to secure their interest and involvement in your post-Summit efforts.

We hope the information contained in this Summit Toolkit Event Planning Guide has been useful. Please share your feedback with us on the attached “Planning Team Feedback Form” (**Attachment 6**). If you have additional questions or need further information about hosting a Joining Forces for Women Veterans Summit, please contact us at:

The BPW Foundation
1718 M Street, NW, #148
Washington, DC 20036
Tel. 202-293-1100
Fax 202-861-0298

Email: foundation@bpwfoundation.org

Web: www.bpwfoundation.org

www.womenjoiningforces.org

Facebook: www.facebook.com/BPWF4WomenVets

Twitter: [@BPWF4WomenVets](https://twitter.com/BPWF4WomenVets)



Attachment 1: Sample Summit Budget Planning Sheet (page 1 of 2)

<u>Income:</u>	Projected Revenue Amount:
<p><u>Restricted Funds:</u></p> <ul style="list-style-type: none"> -donations from individuals or sponsors designated for specific purposes -restricted endowment income -government grants and contracts -private grants or contracts -fundraising campaigns or events 	
<p><u>Unrestricted Funds:</u></p> <ul style="list-style-type: none"> -unrestricted endowment income -government grants -fundraising events or campaigns -unrestricted foundation grants -sponsorship money -donations by individual grantees or members without restrictions 	
<p><u>Registration Fees</u> (if applicable):</p> <p><u>In-Kind donations</u></p> <ul style="list-style-type: none"> -professional services -office supplies -meeting space/Food & Beverage 	

Attachment 1: Sample Summit Budget Planning Sheet (page 2 of 2)

<u>Expenses</u>	Projected Expense Amount:
Budget Item	
Salaries and Benefits	
Facilities or Meeting Space	
Telephone/Internet	
<u>Supplies:</u> -office supplies -food/refreshments -signage, nametags -printing of hand-outs at the event -cost of design & printing of Program -post-Summit report	
<u>Equipment & Audio Visual:</u> -telephone, computer, LCD, audio visual equipment -video recording and/or webcast -photographer -graphic recorder -post-Summit YouTube	
<u>Food & Beverage:</u> Coffee breaks, one meal, etc.	
<u>Travel/Transportation:</u> -parking costs -mileage reimbursement -speaker hotel, travel, per diem costs	



Attachment 2: Sample Logistics Planning Checklist (page 1 of 3)

6-9 months prior to Summit:

- Decide on agenda/themes. Involve Board of Trustees, Advisory Committee.
- Date selection; length of program (1/2 day – am or pm). Make sure that there are no other significant business or community events to compete with your Summit
- Site selection (location and venue for Summit). Some sites may be able to help you have a green event – be sure to ask!
- Compile Summit e-contact list (of potential invitees, speakers, sponsors etc.)
- Issue Save the Date to potential attendees, speakers, partners, etc.
- Identify themes and draft agenda
- Create budget (**Attachment 1** above) and monitor/update regularly. Decide whether or not to charge a registration fee (or if sponsorship \$ will cover costs)
- Solicit sponsorships: prepare [value proposition](#), outlining benefits of sponsorship and [various levels](#) available
- Set-up online [registration](#)
- Involve Board members in planning, sponsor/speaker efforts and on-site interaction
- Identify/confirm partners who support women veterans & your planning efforts
- Invite speakers/attendees that represent a neutral balance of employer/employees/community/policymakers
- Create communications/marketing plan (i.e. frequency of invitations, timing of press releases, etc.). Decide on type/level of [program book](#) for Summit.

3-6 months prior to Summit:

- Send out [invitations/ registration](#)
- Secure Congressional Support or [welcome letter](#)
- Highlight success stories/[best practices for hiring](#)/reintegrating veterans
- Solicit goals and objectives from corporate participants to frame their participation; ask for best practices
- Confirm vendors (i.e. caterer, AV company, webcast company, printer, etc.)
- Continue to confirm [speakers](#)/sponsors, fill in details of agenda
- Collect Speaker bios/sponsor [advertorials](#), etc.
- Continue to implement marketing/communications plan

Attachment 2: Sample Logistics Planning Checklist (page 2 of 3)

1-3 months prior to Summit:

- Make speaker travel arrangements. Send [speaker confirmation letters](#) and provide logistical info. Ask speakers (in that letter) for any outstanding info (bios, photo, etc.). Get speaker approval to announce their name (esp. govt. speakers) in [press releases](#). Notify speakers of [webcast recording](#).
- Order all on-site supplies, hand-outs & and signage
- Send out Issue briefs to speakers/attendees
- Designate someone as official note-taker for the event; allow time to research issues. The notes taken at the event will be used to prepare the [summary report](#).

2-3 weeks prior to Summit:

- Prepare talking points for speakers/panelists. Finalize [testimonials](#) in case they plan to read them. Practice on-site with them prior to start of event.
- Hold a speaker conference call or [webchat](#) to review timing/talking points.
- Discuss with govt. speakers their role (i.e. as stand-alone speaker or panelist)
- Send out [press release announcing keynote speaker](#)
- Provide Board members and staff/volunteers with talking points about project, promotion of event.
- Send speaker & VIP photos to photographer ahead of time
- Send issue briefs to speakers, sponsors and participants, so all have base-level understanding of issues to be addressed at Summit.
- Vendor walk-through with site facilities manager.

Week of Summit:

- Finalize hand-outs ([agenda](#), bios, etc.) and have them printed
- Finalize and prepare all on-site registration materials, nametags, signage, etc.
- Assign staff roles for on-site (i.e. registration, speaker meet/greet, etc.). Do a mock program walk-through with staff ahead of time to practice timing, logistics.
- Send out [press release](#) announcing another speaker (if applicable)
- Confirm number of attendees w/caterer, venue, etc.
- Set up website connection if you are having a [webcast](#) of the event

Day of Summit:

- Meet speakers before event to give them time to get comfortable with presentation area (stage or podium) and practice their remarks
- Set up Registration desk at least 30 min. prior to your advertised registration opening time (people will come early!)
- Hand out Pre-Summit Survey (**Attachment 3**, below).
- Have Board members or selected volunteers assigned to shadow speakers/sponsors and VIPs at Summit
- Assign a staff member to meet and greet VIPs and speakers
- Assign a staff member to instruct photographer on key photos
- Assign a staff member as official note-taker

Day of Summit, continued:

- Assign a staff member to hold time cards up for speakers (to help keep program running on time)
- Thank sponsors, partners. If relevant, have facilitator/opening speaker recognize vets in audience (who have [branch of service stickers](#) on their nametags.)
- Send out [press release](#) with quotes and highlights from Summit

Post-Summit:

- Send Post-Summit Survey (**Attachment 4**) & Commitment Form (**Attachment 5**)
- Transcribe recording of Summit (to use quotes/etc. for final report, [post-summit press releases](#), etc.)
- Prepare a [post-Summit report](#), including outcomes from the Summit and next steps.
- Get photographs from the event. Use to create [post-Summit marketing documents](#).
- Capture any Summit media coverage.
- Thank-You letters, photos and [certificates of appreciation](#) to speakers/sponsors/partners
- Complete and submit Summit Planning Team Feedback Form (**Attachment 6**) to BPW Foundation to help us continue to build upon lessons learned and shared solutions for all women veterans.

Thank you!

For more information about planning or sponsoring a Joining Forces for Women Veterans Summit, or other BPW Foundation programs, please contact us at:

BPW Foundation
1718 M Street, NW, #148
Washington, DC 20036
tel: 202.293.1100; fax: 202.861.0298
foundation@bpwfoundation.org

www.bpwfoundation.org

www.womenjoiningforces.org

Facebook: www.facebook.com/BPWF4WomenVets

Twitter: @BPWF4WomenVets



Attachment 3: Sample Pre-Summit Survey (page 1 of 3)

Joining Forces for Women Veterans Pre-Summit Survey

The purpose of today's Summit is to inform business, government, military and community leaders of specific challenges faced by women veterans and develop action plans for solutions through public and private investment. The Summit's goals are to ensure suitable housing, good jobs, and overall success as civilians for women veterans. We are very interested in learning more about your knowledge of and engagement in working with or supporting women veterans in their communities and workplace. We ask that you take a few minutes to complete this pre-Summit survey.

1. What type of organization are you representing?
 Business Government Military
 Community

2. Are you a woman veteran? Yes No

3. Do you personally know any women veterans? Yes No If yes, how are you related to them?

4. Does your organization currently employ women veterans?
 Yes No I don't know
If yes, can you estimate how many? Yes (please indicate approximate number)
 No

5. Does your company/organization currently have a policy or program that specifically targets women veterans?
 Yes No I don't know If yes, please explain.

6. Has your company/organization ever participated in an education or workforce public-private partnership?
 Yes No I don't know If yes, please explain.

Attachment 3: Sample Pre-Summit Survey (page 2 of 3)

7. Of the four issue briefs that you received, how many did you read?

____0 ____1 ____2 ____3 ____4

8. Which statement best describes your opinion toward public-private partnerships supporting women veterans?

____ I think that the public sector should be responsible for meeting the needs of women veterans.

____ I think that the public sector should be primarily responsible for meeting the needs of women veterans but I do see a role for the private sector.

____ I think that the public and private sectors should work together to assist women veterans.

9. Which statement best describes your opinion about the challenges faced by women veterans?

____ I do not think women veterans face unique challenges; the transition issues are the same for men and women.

____ I am not sure what challenges women veterans face and I do not know if they are relevant to my work or organization.

____ I think that addressing the challenges women veterans face is important but I am not sure how it directly relates to my company, organization or agency.

____ I think that addressing the challenges women veterans face is important and relevant to my company/organization's goals and mission.

10. What statement best describes your understanding of the challenges faced by women veterans?

____ I am not aware of the unique challenges women veterans face.

____ I am aware of some challenges women veterans face.

____ I am aware of challenges faced by women veterans and familiar with promising practices for addressing those challenges.

____ I am aware of challenges faced by women veterans, familiar with promising practices and have designed programs or policies to address those challenges.

11. Of the four issues to be discussed at today's Summit, what issue do you know the most about?

____ Family & community reintegration

____ Employment & careers

____ Not applicable

____ Homelessness

____ Mentorship

Attachment C: Sample Pre-Summit Survey (page 3 of 3)

12. What issue is of most interest to you personally?

Family & community reintegration

Employment & careers

Homelessness

Mentorship

13. What issue do you feel is most relevant to your company/organization? Check all that apply

Family & community reintegration

Employment & careers

All of the above

Homelessness

Mentorship

14. What do you expect to take away from today's Summit?

Thank you. Please return this survey to a staff person by the first Summit break.



Attachment 4: Sample Post-Summit Survey (page 1 of 2)

Joining Forces for Women Veterans
Evaluation Form

Please indicate your affiliation: _____ business ___ government ___ military ___
community organization ___ educational institution

Are you a woman veteran? ___ yes ___ no

How would you rate your . . .		Low	Medium	High		
1. Overall knowledge of challenges and solutions to transition issues faced by women veterans	Before the Summit	1	2	3	4	5
	After the Summit	1	2	3	4	5
2. Knowledge of challenges and solutions related to women veterans and family and community reintegration	Before the Summit	1	2	3	4	5
	After the Summit	1	2	3	4	5
3. Knowledge of challenges and solutions related to women veterans and homelessness	Before the Summit	1	2	3	4	5
	After the Summit	1	2	3	4	5
4. Knowledge of challenges and solutions related to women veterans and employment and careers	Before the Summit	1	2	3	4	5
	After the Summit	1	2	3	4	5
5. Knowledge of purpose and benefits of mentoring women veterans	Before the Summit	1	2	3	4	5
	After the Summit	1	2	3	4	5

In your opinion, what is the most important take-away from the Summit?

Was an appropriate amount of material covered during the Summit? If not, was too much material covered or too little?

Was an appropriate amount of time allotted for discussion? If not, was too much time allotted or too little?

To what extent do you see public-private partnerships as relevant to supporting women veterans' successful reintegration into their families, communities and the workplace?

1 2
Not Relevant

3

4

5
Extremely Relevant



Attachment 5: Sample Commitment Form

**JOINING FORCES FOR WOMEN VETERANS SUMMIT
Next Steps and Commitment Form**

Now is the time to join public and private forces to make sure that women veterans are welcomed back into their homes, communities, and the workplace. As a result of today’s Summit: Joining Forces for Women Veterans, held [insert date and location], we are committed to working with Business and Professional Women’s Foundation and other companies and organizations in our community to leverage resources and expertise and support women veterans in transition. Please complete your contact information and check off areas of interest, below. Submit forms to [insert contact email].

Name _____ Title _____

Company or Organization _____

Phone contact _____ Email _____

___ Key areas of interest: ___ Homelessness ___ Reintegration ___ Careers & Employment ___ Mentoring

___ Leadership and advisory roles to define issues, identify resources, and establish priorities

___ Programs and services that offer promising practices and strategies to specifically address the reintegration needs of women veterans

___ In-kind services and/or donations to leverage program and services support

___ Technical assistance to help launch programs and services and take them to scale

___ Continued research and communication on behalf of women veterans

___ Program and service models to expand recruitment and enhance retention and advancement of women veteran employees

___ Mentoring programs for women veterans

___ Yes, I am interested in supporting a national fund for women veterans and providing resources and expertise to build the fund.



Attachment 6: Summit Planning Team Feedback Form (page 1 of 2)

After the Summit, we ask that the lead coordinator fill out this brief form and return it to BPW Foundation. The purpose is to allow us to track the results and impact of the Summit, and allow us to improve the program for future use. Thank you! Please return forms to: BPW Foundation, 1718 M Street, NW, #148, Washington, DC 20036; or via email at foundation@bpwfoundation.org.

Person Completing Form:

Day Phone: _____

E-mail: _____

Location of Event/Discussion (city, state):

Date of Event/Discussion:

Time of Event (Start & End Times):

Number of Attendees:

We plan to hold another Summit event in the future.

Strongly Agree Agree Neutral Disagree Strongly Disagree N/A

1.) Type of Summit (select one):

- All-Day Summit
- One-time only, single topic, small-group discussion
- Series of small-group discussions based on Summit topics

2.) The Summit Issue Briefs were well-utilized by our event participants.

Strongly Agree Agree Neutral Disagree Strongly Disagree N/A

3.) Outreach: Please describe your outreach efforts (marketing, audiences, etc.)

4.) Registration Process: How did you register participants (mail, online registration system, over the phone, etc?)

Attachment 6: Summit Planning Team Feedback Form (page 2 of 2)

- 5.) Media exposure: was the event covered by the media? Can you share any press releases or news articles?
- 6.) Partners: Please list partners (women’s organizations, community orgs, etc.) and give general information on what was most useful in terms of contributions
- 7.) Sponsors: Please provide a list of sponsors
- 8.) Please provide an agenda
- 9.) Please provide a post-Summit report or summary of the Findings from your Summit
- 10.) Was this Planning Guide helpful? Was the Summit Toolkit helpful? Were there additional ways BPW Foundation could have been helpful?
- 11.) Lessons learned: are there any lessons or experiences you would like to share with others who are planning a Summit?

Thank you!

Please return forms to:
BPW Foundation
1718 M Street, NW, #148
Washington, DC 20036.
tel. 202-293-1100
fax: 202-861-0298

foundation@bpwfoundation.org

www.bpwfoundation.org

www.WomenJoiningForces.org

Facebook: www.facebook.com/BPWF4WomenVets

Twitter: @BPWF4WomenVets