WOMENomics® Forum Toolkit

Section V: Event Planning Guide

Welcome to the WOMENomics® Event Planning Guide. This is Section V of a six-part Toolkit, designed to help you conduct a WOMENomics® Forum at your workplace or in your community. All six sections of the Toolkit are available on our website, www.bpwfoundation.org:

I. Introduction and Overview
   II. Successful Workplaces Discussion Guide (Equal Pay, Diversity, Work-Life Balance)
   III. Empowered Workforce Discussion Guide (Empowering all Working Women, with targeted research on sub-populations such as Women Veterans, Young Careerists, Women in the Green Economy)
   IV. Media Guide
   V. Event Planning Guide
   VI. Webchat Guide

In this section, we provide you with an outline for planning your WOMENomics® Forum, including:

A. Goals and Purpose of Your Forum (pp. 2-3)
B. Advisory Committee Role (p. 3)
C. Board of Trustees Involvement (pp. 3-4)
D. Federal, State and Local Government Support (p. 4)
E. Sponsors, Partners, & Participants (pp. 4-7)
F. Logistical Planning (pp. 7-11)
G. Awards & Recognition: Woman of the Year; Employer of the Year (pp. 11-12)

How to Use this Event Planning Guide

Whether through a formal WOMENomics® Forum, a small-group discussion at work, or in a local grassroots meeting, we encourage you to utilize this section to guide you
through the logistics of holding a Forum. As you decide on the size and scope of your discussion, select those sections of the planning guide most useful to you. Finally, please share your experiences and feedback with BPW Foundation on the “Planning Team Evaluation Form” (Attachment D, page 19), so we can continue to improve this program and share best practices with others.

Note: For the purpose of providing examples, we have used working women and women veterans as a sample topic in some parts of this guide. However this event planning guide applies to any topics contained in your WOMENomics® Forum.

BPW Foundation’s Role in Creating the WOMENomics® Forum
We are pleased to share this signature grassroots program that brings together local businesses, government, educational institutions, and civic organizations in your community. This model program is an outgrowth of BPW Foundation’s extensive experience bringing together key figures from all sectors to create solutions to workplace issues. For information on the history of BPW Foundation and its role in creating this Forum, please refer to Section I of this toolkit.

A.) Defining the Goals and Purpose of your Forum

Defining a clear set of goals and purpose for your WOMENomics® Forum will be a critical first step and lay the foundation for planning your event. For example, if one of the goals is to bring together diverse sectors of the community to discuss issues critical to working women, then you are looking at a larger event that may involve a wide range of stakeholders, including policymakers, employers, nonprofit organizations, and the media. Alternatively, if you simply want to begin a discussion at your workplace to improve pay equity or advancement opportunities for women, then a brown-bag luncheon may suffice. This guide will help you with the logistics of your event, big or small, and provide you with direction on determining the content of your discussion.

Define the Issues:
To help determine which issues to discuss at your Forum, we recommend three important first steps.

1. Review the WOMENomics® Discussion Guides in this toolkit (Section II on Successful Workplaces, and Section III on Empowered Workforce) to learn about some of the key issues impacting working women.
2. Talk to some of the local stakeholders (employers, employees, community organizations, government agencies) about the issues you want to discuss in your Forum. What are their concerns regarding these issues? What would they like to hear about at a Forum?
3. Survey your co-workers/employees to find out which issues matter most. It is critical that your WOMENomics® discussion responds to concerns/issues impacting your co-workers/employees. (For example, there is no use having a discussion on women in the green economy if that has nothing to do with your
workplace.) You can conduct an informal survey (water-cooler discussions) or conduct an actual survey presenting a variety of topics from which to choose. There are several on-line tools that are user-friendly, and some are free (i.e. www.SurveyMonkey.com).

Outline the Agenda:
After identifying the overall theme and issues to be discussed, begin putting together an agenda for the event. For a half-day event, it is best to choose two topics in order to leave time for interactive audience discussion of solutions/opportunities. Be sure to include a balance of 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

Once you have defined the goals and purpose of your Forum and identified the issues to be discussed, the next step is to incorporate representatives from 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 Forum. (Click here for a list of the Women Joining Forces Advisory Council Members.)

As you consider members for your Advisory Committee, keep in mind that both employees and employers benefit from BPW Foundation’s experience and unique role as a neutral convener. Rather than just focusing on challenges and problems that employees face, our balanced approach includes an examination of issues impacting employers as well. In addition, by including policymakers, community, and educational organizations in your Advisory Committee, the relevant stakeholders come together to create collaborative solutions to the day-to-day problems that working women struggle with.

Examples of Advisory Committee duties include overall 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 Forum, you may also consider extending the Advisory Committee’s role, to include overall guidance and issue-based expertise for any related programs that arise from your meeting.

C.) Board of Trustee Involvement

If your organization has a Board of Trustees, get them involved in overall program planning (securing speakers and sponsors) and utilize their talents on the day of the event. Board members might serve as great moderators or keynote speakers; they also can be assigned to “host” specific speakers or sponsors. This adds a personal touch to the event. Board members can begin to build relationships with attendees and speakers
on behalf of the organization. Attendees will appreciate the Board’s outreach and recognition of their contribution and support for working women.

D.) Federal, State and Local Government Support

Congressional awareness and support is extremely valuable in addressing all levels of working women’s issues, as is the awareness and support of your state legislators. To begin, we recommend familiarizing yourself with the key issues outlined in the WOMENomics® Discussion Guides (Section II and III of this Toolkit), paying particular attention to public policy connections. The support of your federal and state congressman and/or senator contributes to the goal of educating and raising awareness among local policy makers about the issues facing working women (who are their constituents). Although it may not be possible to have a Congressman or Senator speak at your Forum, provide legislators with details of your Forum (including partners, sponsors, and speakers) and reinforce the importance of this event. Ask them to send a staff representative and provide a letter of welcome and support that you can include in the event program and/or information packet. You may also want to reach out local (county/city) government representatives.

BPW Foundation regularly monitors and updates information on public policy and legislation that impacts working women. 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 Forum – not only from the obvious financial standpoint – but by showcasing the specific contributions the corporate community can make toward supporting working women. For example, advertorials tell what the sponsoring company/organization is doing with regard to recruiting, hiring, or supporting working women. 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 opportunities). 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 include photography services, catering and hotel accommodations.

Based on your budget, it is important to decide on the level of sponsorships and corresponding benefits of each level. Click here for a sample value proposition, pledge form, sample sponsor confirmation letter and invoice. For example, a potential benefit is having a representative from the funder attend the Forum, 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 working women.

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 A (pages 13-14) to help you with this process. Keep the following tips in mind when beginning your sponsorship approaches and fundraising efforts for the Forum.

**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.
3. Reach out to people based on their interests, not yours.
4. You have to ASK for the contribution.
5. Aim high and ask the donor to consider a specific amount.
6. “No” does not mean never.
7. Thank every donor at least 7 times.

When communicating with sponsors, try to anticipate all of the information you will need from them. For example, beyond invoicing them for payment, will you also need their logo for your website, event signage, or hand-outs? Will you need an advertorial for a Forum program book? Are you asking them to share best practices about working women’s issues, or to submit a testimonial from a working woman (i.e. a women veteran or young careerist employee)? Will one of their representatives speak at the event (and, if so, do you need her/his bio)? You’ll want to request this type of information well in advance of your event and give sponsors plenty of time to coordinate internally to meet your submission deadline.

**Partners**

In addition to your sponsors, you may want to consider partner organizations. The role of a partner organization is to share the program goal (for example, supporting women), and to leverage and provide leadership through their organization’s standing in a community. They can help in securing sponsorships, speakers and attendees; and/or provide logistical assistance, e.g., host the event, as well as advertise the event to their members and/or mailing list recipients.

**Summary of Benefits for Sponsors/Partners:**

- Find collaborative solutions to workplace issues through a community forum or brown-bag discussion.
- Use our research and resources to create a successful workplace that supports working women, improves productivity, and improves your company’s bottom line.
• 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 organization’s policies and best practices.
• Honor leaders in your organization or community by introducing an “Employee of the Year” award and/or “Employer of the Year” award.
• Improve community and employee perception of the organization’s commitment to working women.
• Gain access to and credibility with the women’s community and/or the female customer.
• Position the organization as an attentive and responsive participant in the community.
• Access a BPW Foundation local network and valuable insights into opinions and information about working women.
• Gain visibility through local (and potentially national) media coverage.
• Speaking role at the Forum.
• Recognition in press releases (about the event), on the website, and logo included in program materials and summary report

Participants
It is critical to generate attendance among a balanced mix of all of the key stakeholders: employers, employees, community organizations, policymakers, etc. Involvement of the corporate community (i.e. local Chambers of Commerce) in the Forum is obviously essential, and it is important for businesses to understand the incredible talent, strength and resources that working women bring to the workplace. This is particularly important if your Forum includes topics such as empowering our workforce through women in non-traditional occupations (such as women veterans and women in the green economy). Keep in mind that both employees and employers benefit from BPW Foundation’s experience and unique role as a neutral convener. Rather than focusing single-mindedly on challenges and problems that employees confront, our balanced approach includes an examination of issues impacting employers as well.

You will need to research and reach-out to interested companies to solicit their involvement as speakers and participants willing to discuss and learn more about working women’s issues. They should also demonstrate a willingness to support practices and results. As part of your outreach and research, discuss their experiences, interests, and objectives with working women (or the targeted sub-population of working women). This will help you to better understand your audience, frame the agenda, and make the Forum a more rewarding experience for everyone. Consider specific career and employment sessions, featuring best practices (employer-to-employer), and hiring/recruiting (employer-to-veteran job seeker). Highlight success stories/best practices and focus on lessons learned and future opportunities.
The size of the audience should be conducive to discussion and audience feedback. Business should be at least 30 percent of your audience, as they are the ones who can make a difference in employment for working women. It may be necessary to limit the number of representatives from each organization/agency, in order to include a good cross representation of stakeholders (yet not make the audience too big). This is particularly important to consider as you determine the number of sponsors allowed to attend (i.e. X level of sponsorship allows X number of complimentary attendees), as well as the number of government agency representatives (who may attend at a complimentary or reduced fee rate).

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 webchat – see Toolkit 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, what AV will be available (i.e. do they need their own laptop or will one be provided for presentations,) 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. A Forum 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. To help them prepare, provide guidelines for writing their presentations and suggest that they read or jot some talking points from these. 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. Depending on your topics (i.e. those that include women veterans), if you anticipate significant emotional reactions to remarks given at the Forum, you might consider having a female counselor on hand at the event to help speakers and/or audience members.

F.) Logistical Planning

It is recommended that you choose a lead coordinator and planning committee that can assume responsibility 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

www.BPWFoundation.org
practices. For example, do you want to utilize a woman-owned caterer and/or offer green options to participants? These options 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 and preparation
- 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

**Budget Management**
To begin, 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 Forum, the first consideration logistically will be: how much can we afford? To help you identify costs, please find attached a Sample Budget Worksheet (Attachment A, pages 13-14). 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 (in exchange for their complimentary services, you provide marketing and promotion of their name to a wide audience, as an event sponsor and supporter of working women). This can be a very cost-effective approach, with the added bonus of increasing awareness of supporting working women among a broader community.

**Registration & Invitations**
As you consider your budget, decide at the outset whether or not you will charge a registration fee to attend, or if you can secure sufficient sponsorship money to cover expenses. If you do charge a registration fee, consider the number of complimentary attendees you will need to cover (i.e. sponsors, staff, speakers, VIPs, etc.) and/or reduced-fee attendees (such as government agency representatives). **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 “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 “hard” invitation. It is helpful to partner with organizations that can provide member lists or contacts for invitations. Web-based registration and an RSVP date are highly recommended. (Note: If you are including discussion of women veterans at your Forum, be sure to include “branch of service” on the registration form so this can be acknowledged at the event with branch of service stickers on nametags.)

**Marketing**
Create an overall Forum communications plan that details the timing of press releases, invitations, and other marketing efforts. This plan should include pre-Forum timing of invitations, marketing materials, press releases, social media, webcast, and post-Forum communications. Think about what type/level of Program Book (if any) you will hand out at the Forum. This reference and education resource for your attendees can be an excellent marketing tool, but it is costly and time-consuming and must be managed well in advance of the Forum. 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 Forum on memory sticks. After the Forum, in addition to press releases, marketing ideas include featuring the live webcast (if you have one) on your website; preparing a YouTube video of the Forum, and compiling hand-outs that capture 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) or Equal Pay Day (April). If one of your themes is Women in the Green Economy, April is also the month when Earth Day is celebrated. For Women Veterans, you may want to consider holding your Forum close to Veterans Day (may increase exposure/visibility and chance of media coverage). A half-day timeframe is recommended (i.e. 9:00am – 1:00pm or 1:00 – 5:00pm).

**Site Selection:** Consider securing free or reduced site-rental fees in exchange for in-kind 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 meeting venues and hotels already incorporate green practices into their offerings, practices that will
reflect positively on you. Green or sustainable practices include using locally grown foods, offering bulk water instead of bottles, and recycling.

When evaluating the size of a meeting room, ask whether or not it is big enough for speakers, attendees, AV, 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 Forum, keep in mind that the sound system may be an additional cost (i.e. microphones, projection equipment, etc.). Consider other AV options, such as event recording, webcasting, and graphic recording.

**Food & Beverage:** In addition to the food and beverage needs of attendees (based on program timing), keep in mind the importance of providing plenty of fresh water/glasses for speakers at the podium or on the stage (and refreshing them frequently with each panel/speaker change). For a half-day program, one meal is recommended (i.e. breakfast or lunch). Also, for a 4-hour program, one coffee break will be necessary at the 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 on your [website](#), [Facebook page](#), or newsletter, but also for sharing with sponsors and speakers afterwards as part of their thank you notes. (It’s important to make your photographer aware of key participants and any special shots you will want before the event.)

**Signage:** On-site signage should include registration area, sponsor names/logo, event and room name(s), etc. Ensure enough easels will be on hand to hold signs (typically available from the site facility or AV company).

**On-Site Registration:** Be sure to have enough table space for nametags, program hand-outs, and perhaps an additional table for sponsor/partner materials. If you are handing out a pre-event survey, you will need to have table space (and pencils) to allow participants space to complete the survey.

**Vendor Walk-Through:** If you have a caterer, photographer, graphic recorder, webcast, or an outside AV company at your Forum, 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 with the site facility manager.

**Practice Timing & Flow of Agenda:** Prior to the event, schedule a mock program walk-through with staff, to practice timing and logistics. At the event, have your facilitator
outline the day’s agenda for the audience at the beginning of your program. Ensure lights on stage aren’t blinding (or too hot) and the speaker(s) can see the audience. Seat a staff person 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 our 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-Forum activities/programs.

**Thank you letters**: In addition to sending thank you letters to speakers and sponsors, you might also include a certificate of appreciation and photographs from the event.

**Summary Report**: Based on your audio-visual set-up, you may want to have a recording of the event transcribed for you. If using a graphic recorder, you may also use their drawings to help compile post-event report. Regardless, you’ll want to assign a volunteer or staff member as the official note-taker to capture not only the actual statements, but also the nuances in the room and unspoken atmosphere around the discussion. (This person should be assigned as a note-taker well in advance of the event, to allow sufficient time to review background materials and research the issues.) 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 Forum.

### G.) Awards

**Woman of the Year**
The WOMENomics® Forum is an excellent opportunity to recognize a local “Woman of the Year,” a woman of achievement who is making a difference in the lives of working women. This award is an excellent vehicle for calling attention to the outstanding contributions women make to business and to their communities as a whole. You can work with your planning committee to identify the nomination process and selection criteria for this award. Examples include:

- Leadership
- Career accomplishments
- Civic/community involvement
- Women Helping Women
- Dedication to their field
**Employer of the Year**

Similarly, you may also want to honor local employers for their recognition of the importance of women in the workplace and promotion of quality work policies for women and families. The following criteria are suggested to help you make your decision:

- Provided outstanding opportunities for upward mobility and additional training for female employees.
- Established a job evaluation system that creates salary levels that provide equal pay for equal work, and allows for salaries based on comparable worth.
- Provided opportunities for development of new female talent.
- Exhibited sensitivity to the needs of female employees.
- Provided support for dependent care.
- Established fair and opportunity-based parental leave policies and/or flexible leave policies for employees.

You can send a letter of recognition to the selected Woman of the Year and Employer of the Year, citing and commending their efforts and inviting them to be honored during an award ceremony at the Forum. Be sure to announce these awards to local media through a press release.

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We hope the information contained in this WOMENomics® Event Planning Guide has been useful. Please share your feedback with us on the attached “Planning Team Feedback Form” (Attachment D, pages 19-20). If you have additional questions or need further information about WOMENomics® Forums, please contact us at:

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Email: foundation@bpwfoundation.org  
Web: www.bpwfoundation.org
**Attachment A: Sample WOMENomics® Forum Budget Planning Sheet** (page 1 of 2)

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<td>- restricted endowment income</td>
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<td>- government grants and contracts</td>
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<td>- private grants or contracts</td>
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<td>- fundraising campaigns or events</td>
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<td>Unrestricted Funds:</td>
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<td>- sponsorship money</td>
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<td>-YouTube</td>
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<td>-speaker hotel, travel, per diem costs</td>
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**Attachment B: Logistics Planning Guide – Chronological Summary Checklist**

**6-9 months prior to Forum:**
- Date selection; length of program (1/2 day – am or pm). Make sure there are no other significant business or community events to compete with your Forum.
- Involve Partners, Board of Trustees, Advisory Committee.
- Site selection (location and venue for Forum). Some sites may be able to help you have a green event – be sure to ask!
- Compile Forum 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 (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 and confirm partners who support working women & planning efforts
- Invite speakers/attendees who 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 for Forum.

**3-6 months prior to Forum:**
- Send out invitations/registration
- Highlight success stories/best practices (based on your chosen topics)
- 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, send invoices, fill in details of agenda
- Continue to implement marketing/communications plan

**1-3 months prior to Forum:**
- 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 and/or presence of media.
- 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 Forum:
- Prepare talking points for speakers/panelists. Practice on-site with them prior to start of event.
- Hold a speaker conference call or web chat (see Section VI of toolkit) 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 basic understanding of issues to be addressed at Forum.

### Week of Forum:
- 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 Forum:
- 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 Individual Evaluation Form (Attachment C).
- Have Board members or selected volunteers assigned to shadow speakers/sponsors and VIPs at Forum
- Assign a staff member to meet and greet VIPs and speakers
- Assign a member to instruct photographer on key photos
- Thank sponsors, partners. If women veterans is one of your discussion topics, have facilitator/opening speaker recognize vets in audience (who have branch of service stickers on their nametags.)
- Assign a staff member to hold time cards up for speakers (to help keep program running on time)
- Send out press release with quotes and highlights from Forum
Attachment B: WOMENomics® Logistics Planning Guide – Chronological Summary Checklist, continued
(page 3 of 3)

Post-Forum:
- Transcribe recording of Forum and get photographs from the event. Use to create post-Forum marketing documents.
- Capture any Forum media coverage.
- Thank you letters, photos and certificates of appreciation to speaker/sponsors/partners.
- Prepare a post-Forum report, including outcomes from the Forum and next steps.
- Send a copy of the post-Forum report and Planning Team Evaluation Form (Attachment D) to BPW Foundation to help us continue to build upon lessons learned and shared solutions for all working women.
Attachment C: WOMENomics® Forum Individual Evaluation Form

(Adjust this form to capture items of interest from your particular discussions)

Location of Event/Discussion (city, state): ___________________________________
Date of Event/Discussion: ___________________________________

1.) Type of WOMENomics ® Event (select one):
☐ All-Day WOMENomics ® Forum
☐ One-time only, single topic, small-group discussion
☐ Series of small-group discussions based on WOMENomics ® topics

2.) Which of the following benefits did you gain from attending today?
☐ A better understanding of issues effecting working women in general
☐ An opportunity to find common ground with employers on issues important to working women
☐ Help finding solutions to the challenges facing working women in their community
☐ Networking opportunity
☐ Specific information about the issues effecting working women in their community
☐ Other (specify):

3.) Attending today’s event was well worth the time.
   Strongly Agree  Agree  Neutral  Disagree  Strongly Disagree  N/A

4.) How did you hear about the event: (Select all that apply)?
   BPW Foundation  Direct mail  E-mail/Evite  Flyers/brochures  Invitations
   Newsletters  Newspaper article  Phone calls/phone trees  Social Media
   Website  Word of mouth  Other (specify): ___________________

5.) Please indicate the topics that you discussed at the WOMENomics ® event:
☐ Successful Workplaces: Equal Pay, Diversity, Work life Balance
☐ Empowered Workforce: All Working Women, Women Veterans, Young Careerists, Women in the Green Economy
☐ Other: _________________________________________________________
☐ Other: _________________________________________________________

6.) What, if any, solutions stood out as most promising for your community?

7.) If you have any additional comments you would like to provide to WOMENomics ® Planners, please write them here:

   Thank you for completing this evaluation.
   Please return the form to the Forum coordinator:
   INSERT YOUR CONTACT INFORMATION

www.BPWFoundation.org
Attachment D: WOMENomics ® Forum Planning Team Feedback Form

After the WOMENomics® Forum, please have the lead coordinator fill out this form (based on feedback they received on the Individual Evaluation forms) and return it to BPW Foundation. The purpose is to allow us to track the results and impact of the Forums, and 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 WOMENomics ® event in the next year.
   Strongly Agree    Agree    Neutral    Disagree    Strongly Disagree    N/A

We would recommend to other organizations that they hold a WOMENomics ® event.
   Strongly Agree    Agree    Neutral    Disagree    Strongly Disagree    N/A

1.) Type of WOMENomics ® Event (select one):
   □ All-Day WOMENomics ® Forum
   □ One-time only, single topic, small-group discussion
   □ Series of small-group discussions based on WOMENomics ® topics

2.) The WOMENomics ® Discussion Guides were well-utilized by our event participants.
   Strongly Agree    Agree    Neutral    Disagree    Strongly Disagree    N/A
   The WOMENomics ® Planning Guide was very useful to our planning efforts.
   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?)

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 Forum

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 Forum?

12.) Any other comments/suggestions:

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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