



### Purpose

LEAD 'N LEARN is a smaller group professional and personal learning opportunity featuring local speakers on a variety of topics that could be of interest to certain groups of the LEAD audience. Each LEAD City chooses a topic that they feel will benefit their City and the other LEAD Cities are invited. (Examples are FOIA procedures, new supervisor goals, business writing, etc.) Sessions are typically held in the spring and on site at the sponsoring City and usually 1.5-2.5 hours in length, with a smaller audience than the speaker events.

### Applicability

LEAD Coordinator, LEAD Curriculum Planning Team, LEAD Executive Committee, LEAD City employees, Caterers, Facility managers, and speakers.

### Instructions

#### 1. Speaker Selection

- LEAD team members present some possible topics that their City wants to pursue and the topics are discussed at the spring curriculum planning team meeting for the following spring's event.
- The LEAD Coordinator and City curriculum planning team members research speaker suggestions and bring more information to the next team meeting (could be personal experience with the speaker or a video or another employee's recommendation.)
- If a particular City has a preferred month or date that is discussed before contacting the speaker.
- Once the Curriculum Team chooses the topics and speakers, the LEAD Coordinator contacts the speakers for a phone conversation (usually ½ hour) to discuss LEAD's interest.
  - Send the speaker the LEAD website link and the reason the team is interested in their presentation.
  - Conduct the phone call with the speaker:
    - Why the team is interested in the speaker's topic.
    - Purpose of LEAD and the diversity of the audience (part-time and full time; all different departments; all different educational levels; office and field workers; police, fire, public works, finance, information technology, planning, human resources, engineering.
    - Speaker's experience with local government or similar audiences.
    - Discuss speaker's pricing.
      - 1) \$750 is the current speaker stipend per session (1.5-2 hours)
    - Discuss speaker's availability in March, April, or May.
- The LEAD Coordinator communicates back to the team about speaker availability for their City's topic.

## 2. Booking the Speaker

- LEAD Coordinator emails the chosen speaker to initiate booking the engagement.
- Written agreements or contracts - most speakers have their own written agreements and LEAD requires some documents to set the speaker up as a vendor for the deposit and or payment (if LEAD continues to use the City of St. Charles as the Accounting support).
- LEAD does not currently have a required speaking agreement template but does require the speaker's signed agreement or an email confirmation to the LEAD Coordinator from the speaker confirming the dates, time, and terms of payment as the agreement.
- Choose the dates – Each City will sponsor a LEAD 'N LEARN event, 3-4 weeks apart, usually in March, April, and May on a Tuesday, Wednesday, or a Thursday.
  - City of Elgin's LEAD sessions is typically held at the City of Elgin's Heritage Ballroom at The Centre in Elgin.
    - Contact Michelle Hansen ([hansen\\_m@cityofelgin.org](mailto:hansen_m@cityofelgin.org)) or Anna Moretti ([moretti\\_a@cityofelgin.org](mailto:moretti_a@cityofelgin.org)) to ask if there are any dates in September and October that are not available for The Centre.
  - City of Batavia's session is typically held at their Council Chambers – Wendy Bednarek ([wbednare@cityofbatavia.net](mailto:wbednare@cityofbatavia.net)), Executive and Curriculum team member is the contact for Batavia's location.
  - City of St. Charles' sessions could be held at the public works training room or the PD Community room. Contact is Denice Brogan, Assistant Director of Human Resources ([dbrogan@stcharlesil.gov](mailto:dbrogan@stcharlesil.gov)) from the Curriculum Planning team.
  - Once the three dates are established, confirm the dates with the facilities or contacts above, and request an email confirmation to ensure the correct date and time. Include
  - (See Appendix A for facility and Coordinator checklist).
  - Email the Executive Committee and Curriculum Planning Team members with the chosen dates, times, and speakers so that they can note them on City and work calendars.
- Deposits – *Current LEAD accounting is provided by the Finance department of the City of St. Charles. If the LEAD Coordinator is not a St. Charles employee, he/she will need a contact from the City of St. Charles who can assist with completing the internal accounting processes.*
  - Before requesting a deposit, a City of St. Charles "new vendor" form must be completed and speakers must provide: a) their W-9; 2) a Certificate of Insurance (or sign the City of St. Charles' Short Indemnification form obtained from the Purchasing division) and; 3) A signed ethics agreement (obtained from the Purchasing division).
  - Once the new vendor documents are received, the LEAD Coordinator must obtain a service PO number from the City of St. Charles' procurement system.
  - The PO# is needed to request the check for the speaking deposit.
  - The LEAD Coordinator is authorized to sign speaking agreements on behalf of LEAD.
  - Current accounting personnel that assist LEAD at the City of St. Charles are 1) Alpa Patel, Accounting Specialist ([apatel@stcharlesil.gov](mailto:apatel@stcharlesil.gov)) 630-377-4456; and 2) Colleen Lavery, Assistant Director of Finance ([clavery@stcharlesil.gov](mailto:clavery@stcharlesil.gov)) 630-3774914.
  - Once the signed agreement and deposit have been sent to the speaker and the facilities have the dates reserved, the event is booked.

### 3. Hiring a Caterer (See Appendix B for catering checklist.)

- The LEAD 'N LEARN events include a complimentary breakfast (usually a buffet) prior to the presentation or working lunch.
  - Current budget allows for \$15 per person, all inclusive (food, set-up, equipment, and staff).
- City of Elgin
  - The Centre staff can provide a list of approved caterers from which to choose from.
  - Cuisine America has catered many LEAD events at The Centre and are knowledgeable of LEAD's menu and set-up (see menu and invoices in catering folder).
  - Catering Made Simple has catered a couple of LEAD events at The Centre (see menu and invoices in catering folder).
  - Choose a menu or request a repeat of a previous event and email or call them to confirm the date and time and menu selections. Request an email confirmation.
- City of Batavia
  - Several restaurants are located near City Hall from which to cater.
  - Catering Made Simple will cater at any LEAD City.
  - Speak with the manager on the phone or in person to confirm catering choices and date and time arrangements. Request an email confirmation with date, time, food selections and pricing.
  - Ask on which date you'll need to provide the manager with the guaranteed number of participants (that you are committed to paying for regardless of the number of people that show.)
- City of St. Charles
  - There are several restaurants in St. Charles that cater breakfast and lunch (Smitty's on the Corner, Kabobs, Blue Goose have been reliable in the past).

### 4. Advertising

- Create an Eventbrite registration page for each presentation date, topic and location.
- Add Eventbrite registration links and general description to the LEAD website – LEAD 'N LEARN event page.
- Create an email announcement in Outlook with the presentation theme, speaker information, dates, time and locations; include the Eventbrite registration links in the email for employees to sign up.
  - Send a save the date announcement out in advance through City (or LEAD) newsletters.
  - Send the event email announcement and registration links out 2-3 months in advance for those who like to register early.
    - Re-send a month in advance to all City employees
    - Send a "last chance to sign up" a couple of weeks in advance with a hard deadline for catering numbers.
- Create an event flyer in PDF format and attach it to the Outlook email invitation and the LEAD website.
  - Susan Kempf from the City of St. Charles HR department is very gifted in creating advertising and has contracted with LEAD at times (skempf@stcharlesil.gov).

- Send the Outlook email invitation to all three Executive Committee members, and they forward the email (taking the “FW” out of the subject line) to all of their City employees.
- LEAD Executive Committee members (or their designees) post the event flyer in common employee areas and/or send to departments to post.
- If the LEAD city has a newsletter, LEAD Executive Committee members (or their designees) post the event advertisement in the newsletter.
- LEAD Curriculum Planning Team and Executive Committee members advertise the event personally at employee meetings and through word of mouth.

## 5. **Materials/Handouts** – Always bring a few extra than the registered number of guests

- Event Handout
  - Ask the speakers to provide their handouts or electronic access for Coordinator.
  - Coordinator might want to print handouts to have them available in advance.
- Announcements -Create the opening announcements and speaker introduction and the closing announcements.
  - Ask the presenter to provide his/her bio for your event.
  - Use a former announcement and update it for this event (speaker folder forms).
  - Email two team members from the Executive Committee or Curriculum Planning Team member and ask one of them to do the introductory and one to do the closing announcements. Provide the announcements to them in the email.
    - Bring an extra copy of the announcements to the event; be prepared to do the announcements if the team member is not at the event.

## 6. **Registration Table**

- Nametags –Utilize Avery template for the size of nametag desired.
  - From Eventbrite site, download the attendee list and export to excel.
  - Sort the list in alphabetical order by last name for printing.
  - Use the WORD label and mail merge function to create nametags. Set-up template with LEAD logo, first name, last name and City to print on the label.
  - The day before the event, check to see if the nametags are still accurate based upon cancelations or additions since they were printed.
  - Cut into individual nametags that can be placed in alphabetical order (rather than leaving them on a page of badges).
  - Bring a sheet of extra nametags with just the LEAD logo for participants that come that did not sign up.
  - Have two working sharpies and two working pens.
- Event Handout – give to participants after they select their nametag.
- Participant Roster
  - Use the list you created for the nametags and sort by last name and if desired, create a separate list by City and last name for reference.
  - During registration, add any names for attendees that did not have a printed nametag for an accurate record of attendees.

- After the first break, cross off the names for those that did not attend (nametag would still be on the registration table).
- Other
  - Hand sanitizer, Kleenex, and disinfectant wipes.

## **7. Bag of event supplies**

- Handy supplies – Currently two “SMILE” canvas bags available with extra supplies for events
  - All materials needed for event – handout, nametags, feedback forms, announcements, roster
  - Enough pens to put on the tables for participants
  - Pads of paper for tables
  - Different sized clips, scotch and masking tape, rubber bands
  - Baggies
  - Plastic bowls for mints (if applicable)
  - Two water bottles for the speaker
  - Tablecloths for the registration and other tables if needed (extra in case podium needs to be covered).
- Electronic Equipment
  - Equipment if needed – laptop, projector, speakers for music
  - Mic and receiver box
  - Extra surge protector and extension cord
  - Extension cord for USB to computer

## **8. After-Event Wrap up**

- Submit catering or facility invoices to City of St. Charles to pay.
  - Scan to Alpa Patel (apatel@stcharlesil.gov).
  - Email the caterers to let them know that the invoice has been submitted and payment is likely within two weeks.
- Update registration information
  - Eventbrite-add participants that attended that did not register and cancel those that were registered that did not come so there’s an accurate record of attendance.
  - Update the LEAD website – take off LEAD ‘N LEARN information when event dates are completed.
- Send a list of employees that attended to each Executive Committee member.
- Contact the facility manager if any adjustments need to be made for future events.
- Send a thank you email to team members and any other City employees that assisted with the event.

## Appendix A

### Speaker Event Logistics –Facilities & Coordinator Duties

#### Discuss with facility manager during the booking process:

- Tables and chairs set-up in the room by the facility personnel
  - Determine the best room and table set up based on the type of presentation (if interactive, round tables are best; if a lecture – classroom style is fine.)
  - Reserve one table (in the back of the room and close to the door) for those that come late.
  - Determine if the facility will provide and put on tablecloths (if not Coordinator does this.)
- Projector (facility already has or LEAD Coordinator borrows from LEAD City –St. Charles HR department has one).
- Laptop & remote -speaker typically brings their own; if not, borrow from a LEAD City.
- Sound system/speakers to plug in LEAD's lapel mic/receiver system (mic jack needed from facility's sound system to connect to mic and receiver).
- Podium
- Table near podium for presenter's materials
- Request early arrival for the Coordinator the day of the event (usually an hour and a half in advance of start time).

#### 1 month in advance

- Email or call facility manager to confirm event details.

#### 2 weeks in advance

- Email or call facility to confirm number of attendees for catering order if facility is providing catering.

#### 1 week in advance

- Email final number of attendees for table and chair set-up, confirm sound system arrangements.
- Purchase tablecloths, mints, bottles of water for speaker, if needed
- Create directional signs for attendees, if needed

#### Day before

- If Coordinator is responsible for any sound set-up or putting on tablecloths, it is sometimes more convenient to do this the day before if the facility is available.

#### Day of event – Before Presentation

- Make sure the room set-up is as requested (ask for assistance to move chairs, tables, podium, if needed).
  - Put 2 bottles of water at the speaker podium
  - Make sure there are an adequate number of trash cans for food and one at the registration table for nametag garbage.
- Hang up directional signs to presentation room, if needed.
- Check room temperature and ask for assistance to adjust it if needed.
- Greet caterer and confirm that breakfast will be ready by 7:45 a.m.
  - Inform them that food should be available until after the break which will end around 10 a.m.
- Facility turns on sound system -connect the LEAD mic and receiver to the sound system.
- Set-up laptop and speaker for background music (your own or borrowed from a LEAD City).
- Put extra pad of paper and pens on the tables (and any other materials the speaker has requested).
- Set up registration table outside the ballroom

- Name tags are placed in alphabetical order (participants pick up name tag- no need to sign in).
- Program booklets are available
- Attendee list and additional name tags, sharpie and pens
  - If a participant does not have a nametag, add their name and City to the attendee list to register them later.
- Display the book for the next LEAD book club with a sign-up sheet.
- Greet speaker and assist with equipment set-up
  - Do a sound check with the presenter (facility staff may be needed to assist).
  - Provide breakfast, coffee, etc. for speaker
  - Point out location of restrooms
  - If speaker wants to be alone prior to event, provide space for that
- Provide opening and closing printed announcements to the LEAD team member doing those.
- Greet participants as they enter.
  - Participants may sit where they would like.
  - Note on the alphabetical list if this is someone's first time and make an effort to help them feel comfortable.
- 10 minutes before start time, announce that the presentation will be starting in 10 minutes, point out location of restrooms, and invite participants to take more food if they wish.
- 5 minutes before start time
  - Check in with speaker to make sure he/she is ready
  - Make sure the planning team member is ready with announcements
- Promptly at start time
  - Planning team member welcomes guests, reads announcements, and introduces speaker
  - Ensure that participants can hear presenter – go to the back of the room and listen

#### **Day of event – During Presentation**

- Once speaker starts, go to the back of the room to make sure sound is working well.
- Once event has started and sound is good, go to the registration table to assist late guests and help them get seated at the reserved table.
- Since room is full, check temperature and ask for adjustment if needed.

#### **End of Event**

- Collect remaining the name badges and mark those employees as absent on the alphabetical attendee list.
- Take directional signs down, if in close proximity to the registration table.
- Leave the LEAD book club and sign-up sheet on the table.

#### **Day of Event – After Presentation**

- Assist speaker with equipment and pack up the LEAD equipment
  - Ask the speaker about their experience of the group and ask if any adjustment could be made for the second presentation.
  - Make sure to take all cords, mic equipment, laptop, and projector from the facility.
- Collect pens and any other LEAD materials from tables.
- Distribute leftover food
  - The Centre in Elgin's staff is usually willing to take it for their employees
  - Lincoln Inn-food remains at that facility
- Facility staff take care of all other clean-up.

#### **After Event – See #8 in procedure**

## **Appendix B**

### **Catering Checklist**

**Book Caterer shortly after the event has been booked with the speaker.**

- Check with facility to see if they have a preferred caterers list
- Ask if the caterer has a discount for non-profits or City sponsored events
- Email caterer asking for menu options and fees for a group of about 80 people
  - Breakfast or lunch options that include a vegetarian entrée
  - Beverages – coffee, tea, juice, creamer, sugar, iced tea if a lunch
  - Table supplies – plates, napkins, utensils, cups, salt & pepper, tablecloths or linens
- Catering services
  - Would like all-inclusive service for about \$15 per person
  - Delivery and take-down fees
- Arrive in time to set up and be ready to serve by your designated time
- Sign catering agreement or provide confirming email with menu, date, time, fee, and agreed upon services.

#### **1 month in advance**

- Email or call catering manager to confirm event details.

#### **2 weeks in advance**

- Email or call catering manager to confirm the number of registered attendees.

#### **1 week in advance**

- Email final number of attendees

#### **Day before**

- **Call** catering manager to confirm event and date, time, location, and any other questions.

#### **Day of event**

- Make sure to have the catering manager's phone number and if they are not present within 10 minutes of expected arrival, call to check on arrival.