



Purpose

LEAD Presents! is a larger group professional and personal learning opportunity featuring nationally known speakers on a variety of topics. Sessions are engaging, interactive, and thought-provoking. The LEAD Curriculum Planning Team works throughout the year to screen potential speakers from across the nation, ensuring that we deliver relevant content to our attendees.

Applicability

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

Instructions

1. Speaker Selection

- Employees or team members recommend speakers to the LEAD Coordinator or LEAD team members.
- LEAD team members recognize an important topic for the Cities to engage with and seek a speaker that is knowledgeable about that topic.
- The current practice is to have one speaker a year in the fall who offers the same session at two separate LEAD City venues about 3-4 weeks apart from one another.
 - Example –One on September 15 at The Centre in Elgin and then the second one on October 23 at the Lincoln Inn (Batavia)
- The LEAD Coordinator researches speaker suggestions and brings video clips and biographies to the curriculum planning team meeting in the fall one year in advance of the targeted fall event.
 - Most speakers have their own website that lists the presentation topics and scope of knowledge.
 - Most speakers have a video available to view on YouTube or on their own website for promotional purposes.
 - If a video is not available, contact the speaker directly and ask if he/she has a presentation to view.
 - Send the video link and website information to the Curriculum team in advance of the next meeting and inform the team that the next meeting will be for speaker selection.
- Once the Curriculum Team views the videos and picks some speakers of interest, 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 why 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.
- Many of the City employees have worked for the City a number of years and will likely stay until retirement.
- Current anti-government sentiment toward federal or state government often trickles down to local government employees.
- Discuss speaker's pricing for two separate sessions about 3-4 weeks apart and determine if they meet the LEAD budget.
 - 1) \$7,500 speaker stipend **per session** (including materials); 2) Additional travel stipend of \$750 **per session** (all inclusive -flight, car rental, meals, hotel). Speakers in current budget will receive a total of \$15,000 just for the speaking fee, not including additional travel.)
 - If the speaker's pricing is above LEAD's budget, ask if they are willing to meet our budget.
- If the speaker is in budget and feels the LEAD audience is a good fit, let the speaker know that you would like to establish a conference or Zoom call with the planning team (usually 20 min. – ½ hour).
- Inform the Curriculum Planning team in advance (usually through the agenda) that you've established a conference call with a speaker or speakers for the next meeting and provide them with the speaker's website, bio, video, and any information you obtained on the call.
- After the Curriculum team interviews the speaker(s), the team decides which speaker to hire.
- The LEAD Coordinator communicates back with all speakers to thank them for their time and to let them know if they have been selected.

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 – Current practice involves choosing two presentation dates at two separate LEAD City facilities about 3-4 weeks apart. The fall sessions are typically held in September and October on a Tuesday, Wednesday, or a Thursday.
 - Contact the Executive Committee members from each City to determine if there are any dates in September or October that are not good for their cities.
 - One of the LEAD sessions is held at the City of Elgin's Heritage Ballroom at The Centre in Elgin.
 - Contact Michelle Hansen (hansen_m@cityofelgin.org) or Anna Moretti (moretti_a@cityofelgin.org) to ask if there are any dates in September and October that are not available for The Centre.

- If utilizing Lincoln Inn Banquets in Batavia or a different St. Charles facility, contact the facility to determine any dates that are not available.
 - Contact for Lincoln Inn is Geovanni Rivera (office@lincolnnbanquets.com).
- Once black-out dates for the LEAD Cities and facilities are determined, contact the speaker for his/her preferred dates and choose the two dates.
- Once the two dates are established, confirm the dates with the facilities and request an email confirmation back from the facility to ensure the correct date and time. Include communication about set-up needs (see Appendix A for facility checklist).
- Email the Executive Committee and Curriculum Planning Team members with the chosen dates so that they can note them on City and work calendars.
- Communicate the program time, dates and locations to the speaker for the agreement
 - Speaker –Agenda (actual speaking time is 2.5 hours):
 - 7:30 a.m. – speaker arrives at facility to set up presentation and test sound
 - Start promptly at 8:30 a.m.
 - 8:30-8:35 a.m. – welcome and introduce speaker
 - 8:35-9:45 a.m. presentation
 - 9:45-10 a.m. break
 - 10-11:20 a.m. presentation
 - 11:20-11:30 a.m. feedback forms and closing announcements
- 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.
 - Work with the City of St. Charles’ Finance department or a designated City HR representative to establish the PO #.
 - 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) 630-377-4456; and 2) Colleen Lavery, Assistant Director of Finance (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. Booking the Speaker’s Lodging

- Coordinator communicates to the speaker that the coordinator typically sets up and pays for lodging as there is sometimes a government rate available.
 - Lodging is typically booked for just one night -the night before the presentation.

- Coordinator sends the speaker the links for the intended hotels (see below) to ensure that the speaker understands the location and type of hotel being booked.
- Shortly after the speaking dates are confirmed, the coordinator contacts a hotel near the venue and requests a City government discount, if offered.
 - The Centre in Elgin – [Holiday Inn & Suites, Chicago Northwest](#)
 - Lincoln Inn Banquets or a St. Charles Venue – [Fairfield Inn & Suites, Chicago, St. Charles](#)
- Coordinator reserves the rooms with one of the LEAD City’s credit cards (typically HR director’s), which usually requires the owner of the card to sign a pre-authorization form from the hotel.
 - A week prior to the event, the Coordinator forwards the hotel confirmation to the speaker for his/her reference.
 - Receipt for reservation and final credit card receipts are submitted to the credit card owner’s department for documentation.

4. Speaker Travel Arrangements

- Speakers are responsible for their own travel arrangements (flights and ground transportation) from their location to the hotel.
 - Speakers have a travel allowance not to exceed \$750 for one session. This includes flight, ground transport, meals and any other incidentals.
 - Provide the speaker with the distance from the two major Chicago airports (O’Hare and Midway) to the hotel and inform them that they will need to add at least half hour of additional time in to arrive at the hotel from the airport in the event of construction.
 - Speakers can book an Uber or limo for themselves from the airport.
 - Request that the speaker call you or text you when they have arrived at the hotel from the airport (regardless of the time of day or night) to ensure a safe arrival and to answer any questions for the next day’s event.
- From the hotel to the speaking venue
 - The coordinator typically asks one of the curriculum or executive team members to pick up the speaker from the hotel to bring them to the venue to ensure that they arrive on time and as a point of hospitality.
 - If none of the team members are available, the coordinator arranges a taxi/Uber ride.

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

- The LEAD Presents! Speaking events include a complimentary breakfast (usually a buffet) prior to the presentation.
 - Time – 7:45-8:30 a.m.
 - Current budget allows for \$15 per person, all inclusive (food, set-up, equipment, and staff).
- The Centre in Elgin catering
 - The Centre staff can provide a list of approved caterers from which to choose m.
 - 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.
- Lincoln Inn Banquets
 - They have their own restaurant and catering staff and they have provided several breakfast buffets before the LEAD event- using the same menu would be appropriate.
 - 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.)
- Other Facility
 - Ask the facility if they have any catering requirements or a list of approved caterers.
 - Choose the caterer with the best menu options for the price and the ability to meet your time frame and catering needs.

6. Advertising

- Create an Eventbrite registration page for each presentation date (Appendix C).
- Add Eventbrite registration links and general description to the LEAD website – speaker 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 (Appendix D).
 - 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 (skemph@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 speaker 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 speaker event personally at employee meetings and through word of mouth.

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

- Event Handout
 - Discuss with the presenter if they will bring the handout with them or send you information electronically to create the event handout.
 - Use an already created handout and update the information for the current event (see handouts in speaker event folder) or create a new one if desired.
 - Provide information on the current speaker.
 - Advertise the purpose of LEAD and upcoming events.
 - Provide the names and contact information for team members and encourage input from participants.
 - Copy the handout in color at one of the LEAD Cities (current practice is to utilize the City of St. Charles' HR color copier, and it would be appropriate resource sharing to ask any of the Cities for use of the copier or for their staff to copy it.
- Feedback form -Create a feedback form for the event, designating which date and location on the form (see feedback form in speaker event folder). Copy the number needed for each event.
- 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.

8. **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.

9. 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

10. 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 speaker information and event dates when 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.
- Follow-up with curriculum team members to see if they have any recommendations for the speaker for the second presentation.

- Send a thank you email to team members and any other City employees that assisted with the speaker event.
- Review the feedback forms to see if there are any recommendations for the speaker or LEAD team from participants.
- Scan the feedback forms and email them to the speaker and add any additional comments from the team for the second presentation.
- Enter feedback forms into Survey Monkey (if using this tool) to present to the Curriculum Planning Team and Executive Committee after both presentations are completed.

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
 - Registration table (large rectangular) set up in lobby or room entrance (with 2 chairs)
 - Room –prefer round tables with 6 seats at each table with no one sitting with their back to the presenter (horseshoe set).
 - Reserve one round 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 6-615 a.m.)

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 LEAD feedback form, 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.
- Prior to the break
 - Replenish food, beverages as needed; straighten up/wipe off food and beverage tables as needed
- During the break:
 - Check in with speaker to see if he/she has any needs
 - Reinforce ending time – 11:20 a.m.
 - Ask team members how they think the presentation is going and provide feedback to the speaker, if needed
- After the break:
 - 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.
- Two minutes before ending
 - Be available to give the microphone to the planning team member for closing announcements.

Day of Event – After Presentation

- Thank participants for coming as they leave.
- 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 the feedback forms from the tables and ask if the speaker wants to view them.
- 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
- Check in with facility manager and provide any feedback about the event (positive and negative)
- 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 options that include a vegetarian entrée
 - Beverages – coffee, tea, juice, creamer, sugar
 - 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 7:45 a.m. sharp
 - Can take-down after 10 a.m. break
 - Event ends at 11:30 a.m. for equipment pick-up
- 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.

Appendix C
Eventbrite Announcement

Appendix D

Email Announcement Example



Sign up for one or more sessions! For information or to sign up, click on the registration link.		Spring 2020 LEAD 'N LEARN Events
Team Building Without Wasting Time 1 Meeting; 5 Simple Steps; More Effective Teams	April 2, 2020 City of Elgin The Centre 7:45 a.m.—8:30 a.m. <i>Complimentary Breakfast</i> 8:30-10 a.m. Workshop Register HERE	
 Rob Denker  RD& Partners Master leadership coaches and teambuilding experts  Sue Matson	Having Crucial (tough) Conversations You'll learn to: <ul style="list-style-type: none">• Identify a crucial conversation• Achieve dialogue instead of debate• Know what you want and why• Speak persuasively  Yvonne Agnallo-Adams returns to LEAD bringing years of management and communication expertise. Register HERE	April 23, 2020 City of St. Charles STC Police Department 7:45 a.m.—8:30 a.m. <i>Complimentary Breakfast</i> 8:30-10:30 a.m. Workshop Register HERE
Effective Business Writing This hands-on class is for everyone! <ul style="list-style-type: none">• Brush up on the new writing standards.• Determine the best writing channel to use for your message.  Maureen Keane serves as adjunct faculty at Lewis University and Loyola University in their leadership and communication programs. Register HERE	May 13, 2020 City of Batavia Batavia Council Chambers 11 a.m.—1:30 p.m. <i>Workshop</i> <i>Includes complimentary lunch</i> Register HERE	
www.strongercommunity.net jenkuhn@strongercommunity.net 630-762-7090		