Annual Meeting Planning Guide

Document Purpose

This document is designed to help a network develop its annual meeting guidelines. It can be used by emerging networks to understand what planning an annual meeting entails, or by existing networks to hone their annual meeting gatherings.

It contains: Best Practice, Guidance, Worksheet Template, and an Appendix with examples.

Best Practice

A network's annual meeting is a time for members to connect with other members. It's important to develop and strengthen relationships, engage in peer-to-peer learning, obtain field-building progress updates, and recruit members to serve in leadership roles after the meeting. Because a network is a self-governing body, it is integral that members have a voice in the development of the annual meeting.

One of the most effective ways to accomplish this is to conduct a structured survey that informs the meeting content. Members can be polled for the topics most relevant to their work, and can be asked to volunteer to teach their peers on specific topics. The amount of member involvement depends on the size of the network. As a network grows, committees can be established to organize and run different facets of the event. The annual meeting should engage network members where they are in their daily work, and strengthen their participation and sense of accountability within the network.

Guidance

Below is a set of steps, taken from of *Connecting to Change the World: Harnessing the Power of Networks for Social Impact* [1] that can serve as guidelines for annual meeting planning:

- Guiding Concepts:
  - Make increasing connectivity an explicit objective of the meeting
  - Make enough time for members to connect, not just work together
  - Promote what members are doing and what they know; don't over-rely on outside experts
  - Be fluid at the annual meeting itself; keep to the timing as best you can, and roll with reality
  - Keep the focus on member connections and growth

- Agenda Development:
  - Balance informal and formal networking times

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[1] Plastrik, P., Taylor, M., & Cleveland, J. (2014). *Connecting to Change the World: Harnessing the Power of Networks for Social Impact*. Island Press.

- o For larger groups, include time for everyone to learn together, and times for smaller breakouts
- o If possible, include open space times (scheduled time blocks without programmed content); these spaces allow you to respond to topics that emerge at the meeting
- o Build in time for network planning and surveying on next steps
- o Provide an update on the current State of the Network

- Planning Guidance
  - o Start 6 months in advance with a host city or county
  - o Develop a core team (3-4 people) to help guide strategy, such as meeting goals, agenda topics
  - o Survey the membership for their content priorities, and ask who is willing to teach on which topic area
  - o Assign 2 people to be over the budget to avoid calculation errors; one is point, the other checks
  - o Meet bi-weekly with the Annual Meeting Planning Committee; send out call agendas in advance and use their time to troubleshoot at a high level
  - o Designate staff or 2 network point people to handle logistics, such as booking a block of rooms, arranging transit from the airport to the hotel / meeting location, and dealing with food
  - o Build a shared task list so the team knows exactly what detail each member is responsible for
  - o Send a speaker instruction sheet to recruited speakers before the meeting to focus presentations on lessons learned, road blocks, and candid insights
  - o Send a logistics packet for travelers in advance, which contains:
    - Transportation instructions (airport, transit, etc.)
    - Hotel location / map of the event (meeting, dinner, tour locations)
    - Parking / building access instructions
    - Meeting Agenda
    - Participant list (so members can stay connected after the meeting)
    - A structured network building activity such as a buddy list (see appendix for example) and PPT with attendee pictures and profiles (to connect members more quickly)
  - o Distribute and collect evaluations before the meeting adjourns. Make sure evaluations help you understand how much connecting happened in addition to other evaluation goals
- Learn from mistakes and improve each year

Worksheet

1. What does the network need most right now (for example: to connect, to focus on content, to collaborate, to strengthen leadership)?

2. What are the meeting goals?

3. Who is best suited to handle the meeting event planning details, and how can this responsibility be shared?

4. What dates, location, financial model, and agenda make the most sense for my network, given where they are in maturation (emerging, developing, mature)?

5. How will you find out what are the primary topics of interest, and the member expectations are?

6. What should the State of Our Network presentation address (annual work plan update, member survey data, etc.)?

7. What specific activities in the agenda will build and strengthen relationships between members (ice breakers, evening reception activities, meeting buddies, etc.)?

8. How should the sessions structured to support the meeting goals (for example: powerpoint presentations, breakout conversations, field trips, etc.)?

9. What should the Post Meeting Evaluation Survey contain? What information is needed to improve in the coming year?

Appendix

Samples of an annual meeting relationship building activity, agenda, and evaluation are provided below.

SSDN Annual Meeting Buddies

The buddy system is in place to help integrate new members with veteran members. The following directions are sent to veteran members a week before the meeting:
1. On day 1 seek out your Buddy and introduce yourself, welcome them to the network and share your highlights and experience from past meetings.
2. Find time during the meeting to catch a few minutes together. Offer to be a resource to them during the meeting (answer any questions about how to plug in or anything else).
3. Throughout the meeting, if you see your buddy milling around alone, introduce them to someone nearby and help start a conversation.

It isn't a major commitment, but it does make a big difference to new members experiencing SSDN in person for the first time.

NEW MEMBER BUDDY
- Member X

VETERAN MEMBER BUDDY
- Member Y

Green Cities CALIFORNIA
Accelerating the adoption of sustainability policies and practices

June 2015 Annual Meeting Agenda

June 15th-

4:00PM   Welcome and Introductions with brief highlights from each member

5:00PM   Overview of Sustainability Initiatives from the Host City- (Billi, Timothy and Neal)

6:00 PM   US Conference of Mayors Annual Conference and Pre-Meeting with the City of San Francisco

6:45 PM   Dinner

June 16th-

Breakfast

9:00AM   - Overview of GCC Organizational Structure and Annual Work Plan
        Integration into the model for a USDN Regional Network
        GCC Priorities
        Working Groups
        Budget

- Qualifications for Membership

- Operational Issues
    1. Protocol for grants
    2. Website/ member participation

- Develop 501 (c) (3) (Working Group)

Lunch (catered)   Note: *Cities Part of the USDN CBSM-Water Grant Meet to Discuss*

1:00 PM   - Community Choice Aggregation
                        Updates in Bay Area (Seth Baruch, GCC Consultant)
                        Updates from members about CCA Actions
                        GCC opportunities for collective action/ grant support/working group

2:45PM   - Energy Efficiency: Challenges, Opportunities and Actions
                        Recap from Energy Benchmarking Workshop (GCC, USDN. IMT, et al)
                        Updates from members about EE Actions
                        GCC opportunities for collective action/ grant support/working group

3:30PM   - Water Conservation and Drought Response
                        Recap of USDN Multi-city effort (pending updates)
                        Updates from members about Water Conservation and Drought Response
                        GCC opportunities for collective action/ grant support/working group

4:15PM   - Climate Action Plans and Implementation
                        Updates from members about CAP and implementation
                        Coastal Resilience/Local Coastal Program Best Practices (Goleta example)
                        GCC opportunities for collective action/ grant support/working group

5:00PM   Dinner

7:00PM   - Community Based Social Marketing

June 17th-

Breakfast

9:00AM   - GCC Website and Logo Update
                        Member review of proposed Logo
                        Member review of new website
                        Discussion of other social media options

10:15AM   - Product Stewardship- Pharmaceutical Take-Back Programs
                        Recap from CA Product Stewardship Council (pending Heidi's availability)
                        Updates from members about Pharmaceutical Take-Back Programs
                        GCC opportunities for collective action/ support/working group

11:0AM   Recap of next steps for GCC

Noon   Meeting Adjourned- boxed lunches provided

SSDN Annual Meeting Evaluation – November 2014

Name: _____

1) Please react to this statement: Overall, the meeting was well worth my time.
   □ Strongly agree   □ Somewhat agree   □ Somewhat disagree   □ Strongly disagree

2) How many SSDN members do you feel will respond quickly if you contact them for information & advice?
   _____ Is this more than before the meeting?   Yes □   No □

3) How many members do you plan to follow up with after the meeting for deeper exchange /collaboration?
   _____

4) Did you learn about SSDN activities/workgroups that you joined/are likely to join or start?   Yes □   No □
   If so, how many_____, which
   one(s)_____

5) How many ideas and practices are you taking back to your city/county?   _____   Will you continue
   exchanges with other SSDN members?   Yes □   No □   If not, why
   not?_____

6) Rate the following activities of the meeting in terms of their usefulness to you.

   3 = EXTREMELY Useful   2 = Somewhat Useful   1 = NOT Useful

Activity	Score 1-3	Comment
PRE-MEETING: Tour		Tour:
WEDNESDAY: Plenary- Sustainability Funding		
WEDNESDAY: Breakout Session I		Topic:
WEDNESDAY: Lunch Presentation- Solar and EV		
WEDNESDAY: Panel- Community Engagement		
WEDNESDAY: Breakout Session II		Topic:
THURSDAY: Adaptation Presentations		
THURSDAY: State of the Network		
THURSDAY: Call for Leadership		
ALL DAYS: Unstructured Time (breaks, meals)		

7) Rate the amount of unstructured time during the meeting: Not enough □   Just right □ Too much □

8) Rate the amount of substantive learning of the meeting: Not enough □   Just right □ Too much □

9) Rate the length of the meeting: Too short □   Just right □   Too long □

10) What is the most significant learning, information, or insight that you took away from the annual meeting?
11) How could the meeting have been improved to increase your satisfaction?
12) What was the low point of the meeting for you?
13) What was the highlight of the meeting for you?