

## Seminar 3: “Leadership in an Era of Globalization”

### Timeline and Checklist

### 2022-2023 Cycle

**IMPORTANT NOTE:** This checklist is a detailed guide carefully curated to help you in planning the *Leading in an Era of Globalization* seminar. It is meant to be a guide and not a rulebook. It should be adapted for each seminar you run and based on the most current version of your agenda at all times. You may need to accomplish some of the items on this list in different orders or time frames depending on various circumstances.

#### **Staff Roles and Responsibilities**

As you will see in the following checklist, there are a lot of items that need to be completed in order to succeed in having an amazing, delightful, and challenging seminar for the Fellows! This is why there are two staff members per seminar. Below is a breakdown of the major responsibilities. We suggest you delineate responsibilities quickly and early on. Don't assume you both will work together on every part, or you will be overwhelmed!

1. **GENERAL:** Encompasses duties that apply to both staffers, such as booking flights, general planning, and onsite responsibilities such as coordinating all logistics, checking in with moderators, prepping seminar room, communicating logistics to both moderators and participants, anticipating and dealing with issues, and so on.
2. **FELLOW COMMS:** Person responsible communicates all details to the Fellows (4 standard logistics notes, plus back and forth). Also responsible for following up with unresponsive Fellows, tracking Fellows responses, and adding data and details to Salesforce.
3. **MODERATOR COMMS:** Person responsible communicates all details to the Moderators (3 standard logistics notes); sets up pre-seminar and debrief calls; sets up onsite meetings as needed. Also responsible for gathering seminar assignments from lead moderator and ensuring moderators have access to moderating notes and talking points as needed. Also responsible for ensuring moderator stipends and reimbursements are paid at the end of the seminar.
4. **VENUE MGMT:** Person responsible communicates all needs and requests to the hotel – includes arrangement of BEOs, meals, AV, rooming list, and ground transportation. May also include arrangement of offsites or excursions if hotel is involved. Also responsible for ensuring contractual deadlines are met (ie, deposit deadlines, final payments, attrition deadlines, etc.)
5. **EXCURSIONS:** Person responsible arranges appropriate excursions and offsite dinners during the times indicated on the base agenda – includes reservations, payments, and ground transportation needs. Factors in details such as ideal timing based on the agenda, driving distance from the venue, cultural attractions that are

non-touristy, and budget constraints. (Remember, the goal of excursions is to get Fellows out of the seminar room, to give them space to talk to one another, and the ability to either be in nature or experience a relevant venture that is nearby).

6. **MATERIALS**: Person responsible ensures all materials are prepped and ready onsite (either by assembling onsite or by shipping ahead of time). Includes handouts, table tents, name badges, welcome packets, videos to be shown onsite, gift items, supplies (office and team-building), etc. May also include updates to the agenda or ventures/bios doc during the pre-seminar preparation. Also includes the shipment of readings to the Fellows.
7. **VENTURES**: Person responsible ensures venture descriptions and responses to the plenary presentation questions are properly gathered. Also responsible for creating Fellows' small groups according to objectives.
8. **SAFETY**: Person responsible for ensuring risk mitigation best practices and COVID regulations are being followed.
9. **BUDGET**: Person responsible ensures budget guidelines are met during planning phase and properly projects expenses. Also communicates any discrepancies and/or requests outside of the budget guidelines to Olivia O'Neil. Also closes out the budget and tracks final payments.
10. **WRAP UP**: Person responsible ensures proper closeout of the seminar: all data is in Salesforce, such as final agendas, survey responses, etc.; and all final documents are also in SharePoint. Person also preps, administers, and analyzes survey, as well as leads the post-seminar debrief call. Also gathers testimonials from Fellows who received scholarship support. Lastly, the person ensures all notes from the seminar are compiled (check-in, check-out, ventures).

### Ongoing Reminders

- **BUDGET** Review your budget and update with any estimated or actual expenses. Communicate any discrepancies to Olivia O'Neil.
- **GENERAL** Save your invoices and/or contracts in Basecamp
- **FELLOW COMMS** If you receive new contact info, travel details, or bio info from Fellows, update those directly in Salesforce
- **FELLOW COMMS** If a Fellow indicates they will be bringing a spouse for meals and excursions only, provide payment details. Check or wire transfer are the preferred payment methods. If a Fellow would like to pay via another avenue (i.e. credit card), please reach out to Olivia O'Neil. Ask Olivia O'Neil if you have any questions on how to process checks or wire payments.
- **GENERAL** We use Salesforce to manage much of the seminar details. At any time, please check out [these screen steps](#) for a refresher on Salesforce specific processes, such as sending logistics notes, creating the survey, collecting/updating data, and so on.
- **SAFETY**: Continue to update the [Country Risk Tracker](#) with the latest information.

## **4 Months Out**

- **GENERAL** Plan out your seminar timeline based on this checklist and on the staff trainings. Add the dates you plan to send the logistics notes to your work plan. Think through key deliverables and plan out roles and responsibilities between you and your co-staffer. Be sure to delineate responsibilities evenly and take into account timelines and deadlines for your other projects.
- **VENUE MGMT** Check your venue contract for important deadlines such as the ones below. Consider adding these to your own calendar to serve as reminders.
  - Room release (attrition) deadlines and submission of rooming list deadlines
  - Deposit and Final payment schedule
- **MATERIALS** / **GENERAL** Customize the [staff agenda template](#) for your seminar by adding the correct location and dates. Familiarize yourself with the Staff Notes in particular – these will indicate when you might need special requests from the venue, such as AV, special table set-ups, and so on. Moderator Notes are primarily for the moderators, but you should also be aware so you can remind moderators of specific things they need to say or do. And last, note the materials – you will find links to the specific materials needed, which are also linked in this checklist! If you have any questions on the items, ask Charlotte.
- **SAFETY** If your seminar is in an international location, [register](#) with the US State Department's STEP program for safety updates on that given country.
- **SAFETY** Check local, state, and country guidelines for COVID. Pay special attention to any travel or quarantine restrictions that may impact Fellows. Ensure the [Country Risk Tracker](#) is up to date.
- **SAFETY**: Create a [Risk Management One Pager](#) and update according to your seminar needs and associated risk.
- **FELLOW COMMS** Request a group page link from Sam Cherry. After you have the link, add important dates to the calendar feature and upload the Globalization Travel, Visa, and Accommodation FAQs as a discussion post. [Click here](#) to find the template and customize for your seminar. Send Sam Cherry your WhatsApp group join link QR code to be uploaded to the page. Reach out to Sam with questions.
- **FELLOW COMMS** Map out your logistics note schedule.
- **VENTURES** / **MATERIALS** Contact the Fellowship POC for each program and collect all venture descriptions and confidential notes.
- **FELLOW COMMS** Create a WhatsApp and WeChat account for yourself. You will use this as a way to send quick reminders throughout the process to the individual Fellows. Work with Sam Cherry if you have any questions.

- **FELLOW COMMS** Set up a WhatsApp group and add the Fellows whose mobile numbers you have. Include a link to join the group in your first logistics note.
- **FELLOW COMMS** Send the **first logistics note** to Fellows. Customize the template for your seminar with your own voice (this is your first impression with the Fellows!) and let Phoebe know if there are issues with any merge fields. You should draft the note and begin testing it at least one week before you plan to send the email. The emails should be sent individually so that you can copy other staff members and assistants. Refer to the [logistic notes template packet](#) for the main messaging points and purpose of each of these notes as you customize to your own style. Be sure that the personal form linked in the email has proper settings activated (*including manual change: Travel Status = Not Needed*) to gather the correct information (see [screensteps](#) for detailed guidance)
- **FELLOW COMMS** After sending the logistics note, take a video on your phone of you and your co-staffer introducing yourselves to the Fellows and send it to the WhatsApp group. Encourage the Fellows to also record a selfie introduction! Ask them to:
  - 1) Tell everyone a little bit about themselves
  - 2) What role did you play in Antigone? OR What are you looking forward to most during our upcoming seminar?
- **MODERATOR COMMS** Send the **first logistics note to Moderators**. Use the template for the Fellows but tailor it for the moderators. Be sure to also ask if the moderator will need a copy of the Chinua Achebe book – many moderators keep old copies and therefore may not need a new copy.
- **FELLOW COMMS** If a Fellow responds saying they need a visa, [use this template](#) to send them a letter from the AGLN.
- **SAFETY** If a Fellow responds with dietary restrictions, consider following up to understand whether it is a preference or an allergy. If allergy, work with the Fellow to fully understand its severity.

### **3 Months Out**

- **MATERIALS** Readings will be shipped to the DC office and the staff members assigned to each seminar are responsible for packaging and shipping the readings. Update and then print the [standard readings cover letter](#) and include as an insert in each of your mailings. Use Fedex or regular USPS for domestic shipments and DHL for international shipments. You should pull all fellow mailing addresses from the custom link section of the Special Event Record. Be sure to add the participant's tracking number to their Salesforce profile and indicate once they have confirmed that their readings were received. Refer to the [screensteps](#) for additional guidance. Ensure these are shipped out no later than 3 months before the seminar.
- **FELLOW COMMS** Send the **second logistics note** to Fellows. You should use the same process as the first logistics note. Please customize language to fit your voice and reflect how you've been communicating with specific Fellows up to this point! Be sure that the

personal form linked in the email has proper settings activated to gather the correct information (see [screensteps](#) for detailed guidance)

- **FELLOW COMMS** Send a note to the participants individually via WhatsApp or WeChat to let them know you sent an email and remind them to submit travel information.
- **MODERATOR COMMS** Send the **second logistics note to Moderators**. Use the template for the Fellows but tailor it for the moderators.
- **FELLOW COMMS** One week after readings have been shipped, confirm Fellows have received their readings. Also be sure to connect with any Fellows via WhatsApp or WeChat that you have not already connected with.
  - **SAFETY** Check local, state, and country guidelines for COVID. Pay special attention to any travel or quarantine restrictions that may impact Fellows. Ensure the [Country Risk Tracker](#) is up to date.
- **SAFETY** Connect with Brian White from RSM to schedule a risk management training specific to your country ([brian.white@rsmconsulting.us](mailto:brian.white@rsmconsulting.us)) and copy Olivia O'Neil
- **SAFETY** Prepare the excursion waivers for any spouses joining the seminar.
  - **GENERAL** For international seminars, visit the [State Department website](#) to log the event and sign yourself up to receive travel alerts.
  - **FELLOW COMMS** Post the draft agenda to your group page on the website. To develop the fellow version of the agenda, remove all team and moderator notes.
  - **EXCURSIONS** Begin brainstorming off-site dinners and excursions.
  - **GENERAL / MODERATOR COMMS** Where possible, consider inviting in local Fellows for an evening to give them a chance to share their thoughts on leadership challenges in the context of their region with visiting Fellows. Be sure to work on ideas like this in coordination with the seminar moderators.
  - **GENERAL** Book your own flight and secure your visa. Ensure you familiarize yourself with the exchange rate and currency if traveling to an international seminar.

## **2 Months Out**

- **EXCURSIONS** Continue working on any off-site dinners and excursions. Be sure to get feedback from moderators on the excursions with plenty of time to make adjustments.
- **GENERAL** Book your own flight and secure your visa if you haven't already. Remind moderators to do the same.
- **SAFETY** Work with your co-staffer to plan roles in the event of an emergency – who will do what?
- **SAFETY** Check local, state, and country guidelines for COVID. Pay special attention to any travel or quarantine restrictions that may impact Fellows. Ensure the [Country Risk Tracker](#) is up to date.

## **6 Weeks Out**

- **VENUE MGMT** Contact your conference services manager to begin creating BEOs – send them the draft staff agenda, meal requests and dietary restrictions, meeting room setup needs (including a reminder of the hollow circle set up and any AV needs). You should plan a call with the venue to go over the agenda in detail.
- **MATERIALS** / **VENUE MGMT** Update the staff and regular agenda with specific details based on your conversations with the venue.
- **FELLOW COMMS** Post the most updated version of the agenda on the group page on the website, replacing any previous versions. You should also post the draft bios document.
- **MODERATOR COMMS** Schedule a pre-seminar call with moderators to review agenda and assignments. The call should occur at least 2 weeks in advance of the seminar. Also ask your moderators for the readings assignments if you have not already received them.
- **VENUE MGMT** Check with your venue on the earliest date you may ship materials/gift bags. This should be done as early as possible – especially for international venues. All materials and swag should be packaged and shipped by the staff assigned to each seminar. NOTE: as shipping internationally is tricky, you may also consider taking items with you when you travel rather than shipping.
- **VENTURES** / **MATERIALS** Continue to collect venture updates and confidential notes from each respective program manager. Make sure all venture information is uploaded to Salesforce.

## 4 Weeks Out

- **FELLOW COMMS** / **VENTURES** Send the **third logistics note** giving Fellows a heads up about venture sessions during the seminar. Work with Seth to ensure the agenda for your venture sessions are up to date.
- **MODERATOR COMMS** Send the **third logistics note to Moderators**. Use the template for the Fellows but tailor it for the moderators.
- **VENUE MGMT** Use the travel details you've logged in Salesforce to compile the Rooming List for your venue based on the template they share. Send the rooming list to your venue, complete with travel details and dietary restrictions. Remember to release any unneeded room nights (per your contract).
- **MATERIALS** Work with your co-staffer to brainstorm a list of needed materials for the seminar, you can use the list below as a jumping off point. Work with Charlotte to either order the needed materials yourself or locate them in the office.
  - Office supplies: cardstock, dinner tents, etc.
  - Any supplies you might need for team building exercises
  - Lanyards for name badges
  - Convertors for international seminars if needed

- First aid kits
- Bell if needed
- COVID safety supplies and test kits
- **FELLOW COMMS** Follow up with Fellows who haven't sent travel plans and communicate any changes or updates to the venue.
- **MATERIALS** Update the agenda based on any current changes to excursions and/or timing.
- **BUDGET** / **MATERIALS** Have a check in meeting with Olivia to review your agenda and budget.
- **SAFETY** Read the local news starting at least a month away from the seminar
- **SAFETY** Check local, state, and country guidelines for COVID. Pay special attention to any travel or quarantine restrictions that may impact Fellows. Ensure the [Country Risk Tracker](#) is up to date.
- **EXCURSIONS** Continue locking in logistical details for off-sites and excursions.

### **3 Weeks Out**

- **MATERIALS** Consolidate bios and venture descriptions for Fellows using the Salesforce template. Make sure it is the version with both the bios and ventures for the Fellows. Then create a version for moderators/staff with the confidential notes added in.
- **MATERIALS** Print and ship materials that are needed on site. Items with a \* are generated in Salesforce.
  - Multicolored flip chart markers
  - Tacks and tape for hanging papers
  - Scissors
  - Colored dots
  - Extra cardstock – only few extra pieces
  - Printed table tents\* - You should have two sets. Ship one and carry the other in your suitcase.
  - Printed name badges\* & Lanyards - Ship one and carry the other in your suitcase.
  - Contact Sheet\*
  - Agendas - ONLY IF FINAL
  - Moderator/staff versions of the agenda - ONLY IF FINAL
  - Bios/Ventures document\* - ONLY IF FINAL
  - Bios/Ventures document with confidential notes (for moderators and staff only) - ONLY IF FINAL
  - Swag laptop cases
  - Blankets
  - Thermometer

- Clock
- Cell phone tree
- Speaker
- Bell
- Dinner table tents – enough sets for 4 dinners
- Extra dinner table tents – only need a few blank
- [Printed welcome letter from staff](#)
- Print the [Venture Sessions Handout](#)
- Print the [Session Talking Points](#) for the moderators
- First Aid Kit and any safety materials needed for excursions (i.e., walkie-talkies, etc.)
- Small games (playing cards etc.)
- COVID-19 Safety materials (testing kits, cleaning wipes, masks, etc)
- **FELLOW COMMS** Follow up with Fellows who haven't sent travel plans and communicate any changes or updates to the venue.
- **MODERATOR COMMS** Send the latest staff agenda and the bios/ventures document with confidential notes to moderators in advance of the pre-seminar call
- **SAFETY** / **MATERIALS** Print the following pieces of information for you and fellow Staff to have at seminar
  - Contact info for hospital facility (whether local or contracted)
  - Addresses and relevant phone numbers for venue and all off-sites
  - If international: copy of international insurance
  - If international: contact info for Embassy along with contact info for the Regional Security Officer (RSO)
- **SAFETY** Continue to read the local news of your seminar location
- **SAFETY** Check local, state, and country guidelines for COVID. Pay special attention to any travel or quarantine restrictions that may impact Fellows. Ensure the [Country Risk Tracker](#) is up to date.

## 2 Weeks Out

- **MATERIALS** Print the name badges for fellows, moderators, and guests using the template in Salesforce. Upload the final pdf of the name badges to FedEx and get them printed by emailing [usa1344@fedex.com](mailto:usa1344@fedex.com). In your email, attach the design file and be sure to ask for the name badges to be printed in color, double-sided, laminated, and 1 hole punch at the top.
- **MODERATOR COMMS** Hold pre-seminar call with moderators to go over agenda assignments and logistics. Be sure to discuss:
  - General flow of the week

- What team building activities to do and who will lead this session. Click [this link](#) for suggestions. NOTE: We recommend this breakdown for team-building activities:
  - A quick 10-15 min exercise to get blood flowing and access listening skills
  - A quick 10-15 min exercise that will allow fun facts to be learned about each other
  - A longer more challenging exercise, hopefully with partners and/or emphasizing listening skills – 20-30 min
  - 60 minute traditional “check-ins” (No more than 2 minutes each)
- The excursions and offsites – are they appropriate and suitable?
- **MATERIALS** / **VENUE MGMT** Track the progress of your shipments and notify your venue that your packages are in route by sending the tracking number.
- **WRAPUP** Prep the survey by updating the seminar Special Event Record and Moderator/Team Special Event Attendee Records in [Salesforce](#) with sessions and evaluation criteria particular to your seminar.
  - The following venture sessions should be added verbatim as the type “**Breakout**”:
    - Rapid-Fire Venture Presentations
    - Small Groups on Venture Challenges
    - Debrief on Ventures and Opportunities for Venture Support
  - Other sessions, such as the following examples, should be added as type “**Excursion**”:
    - Team-Building and Introductions
    - Excursion #1 (customize to your specific session)
    - Excursion #2 (customize to your specific session)
    - Closing Reception and Dinner
  - Reach out to Moderators to determine which of the following evaluation criteria they would like to get feedback on and update on their Special Event Attendee Records in Salesforce.
    - Understanding of the text and linkages among them
    - Ability to pace discussions and involve all participants
    - Ability to hold the space for meaningful discussion
    - Ability to respect, affirm, and create space for diverse and divergent opinions
    - Ability to convey genuine curiosity, to ask thought provoking questions
    - Ability to adapt to the group’s specific needs and any special opportunities or “gifts” that participants offer.

- Willingness to push people appropriately to go deep (intellectually and/or emotionally)
- Determine which evaluation criteria you and your co-staffers would like to get feedback on and update on your Special Event Attendee records in Salesforce. Choose between the options below depending on if you want to focus on feedback related to planning & execution or presence at seminar. If you have a specific growth area not listed below that you would like to receive feedback on, reach out to Olivia to discuss. Feedback from Fellows is just one data point, we suggest each staff pair ask moderators for specific feedback and areas of improvement during debrief calls.
  - *(Planning & Execution)* Ensured a smooth seminar in all administrative details and meal, event and activity execution
  - *(Presence at Seminar)* Exhibited an additive presence during seminar, was attentive to participant needs and displayed a strong ability to support the participant experience
- Test your survey to ensure it is ready and updated. Check both the “Evaluation Form URL” (for Fellows) and the “Internal Evaluation Form URL” (Staff/Moderators). Reach out to Brianna Curran with survey questions.
- **SAFETY** Continue to read the local news of your seminar location
- **SAFETY** Check local, state, and country guidelines for COVID. Pay special attention to any travel or quarantine restrictions that may impact Fellows. Ensure the [Country Risk Tracker](#) is up to date.

## **1 Week Out**

- **VENUE MGMT** Hold a pre-seminar call with your conference services manager if needed to tie up any last-minute details. Be sure to send a final rooming list and advise the venue of participant travel changes as they occur.
- **MATERIALS** Compile the final agenda and the bios/ventures document for the final logistics note.
- **FELLOW COMMS** Post the final agenda and bios/ventures document to the group page on the website.
- **FELLOW COMMS** Send the **final logistics note** to Fellows. [Linked here](#) are two versions of this note, one for Fellows missing venture info and one for those who have completed the info. Please customize language to fit your voice and reflect how you’ve been communicating with specific Fellows up to this point!
  - Note 4, Venture Info Complete
  - Note 4, Venture Info Missing

- **FELLOW COMMS** Follow up with individual Fellows via WhatsApp and WeChat to let them know you sent a note. Give them the link to the group page on the website. Remind them to send their two-minute introduction videos if they haven't already.
- **MODERATOR COMMS** Send a **final logistics note to the moderators**. Be sure to customize this for the moderators and include the latest staff agenda, and version of the bios/ventures document with confidential notes.
- **GENERAL** If a critical mass is arriving the day before, consider organizing an optional dinner for early arrivals. There are some funds set aside for this in each seminar budget.
- **MODERATOR COMMS** Schedule a debrief call with moderators and coordinators to occur about 1-2 weeks after the seminar. Include Todd on all calendar invitations in the event that he is available/interested in joining.
- **GENERAL / MATERIALS** Gather the materials you are carrying with you to the seminar:
  - Agendas
  - Moderator/staff versions of the agenda
  - Bios/Ventures document
  - Bios/Ventures document with confidential notes (for moderators and staff only)
  - Name badges and lanyards
  - Cameras, if using
  - 1 set of the table tents
- **GENERAL** Get cash for expenses onsite. Especially for giving tips – plan these out according to customs of the area and your budget. Also be sure to exchange cash if needed.

**Arrival on Site Day before Event** - Also reference the notes in the Staff Agenda as you plan out your week. You want to start tracking tasks there in the days leading up to the seminar.

- Meet with your conference manager to go over the final agenda, AV, and transportation needs, and banquet event orders.
  - Ensure water will be at the seminar table at all times (and that they are regularly refreshed).
  - Make sure coffee breaks with snacks are scheduled.
  - Ask that staff set up breakfast and lunch buffets 10 minutes ahead of schedule, and that they break down the buffet's 5 minutes early to ensure fellows transition quickly to the seminar room.
- Meet with moderators to go over the schedule and answer any questions they may have. Be sure to have their welcome packets with the Staff versions of the agenda, as well as the Ventures/Bios document with confidential notes. If all are not on site the day before, meet the morning of the first day. Be sure to communicate any changes to your onsite venue manager.

- Plan how to track attendance with your co-staffer. One suggestion is to use a google spreadsheet to update when a Fellow arrives to the seminar room in the morning, or to an excursion rendezvous point so it is easier to track who is not present. You can also create and print hard-copy rosters to check-off.
- Check out any offsites or excursions in-person if you can to ensure they will be suitable.
- Gather any last-minute supplies or medicines in town
- Remember to take photos throughout the seminar, you will send them to Sam after the event ends.

## Day One

- Tasks specific for Day One
  - Assemble the welcome packet:
    - Welcome letter from staff
    - Final Agenda
    - Bios/Ventures document
    - Venture Sessions Overview document
    - Map of venue – if applicable
  - Check all rooms and ensure the set-up of the conference room is correct (set for number in the seminar plus moderators in an oval or circle shape and table for staff).
  - Set out table tents, welcome folders, and swag around seminar table (ensuring an even distribution of men/women, programs, country, etc.)
  - Track flight arrivals and ground transportation and ensure all Fellows are arriving on time. Flight Tracker is a helpful app to do this.
  - Send a welcome note to all the Fellows via WhatsApp. Remind them when and where reception is, and to bring their readings with them.
  - Arrive to the welcome reception at least 45 minutes in advance to set up:
    - Set out name badges in alphabetical order at the welcome reception.
    - Set out dinner table tents for assigned seating at the dinner. Ensure moderators/staff are split up and there is a diverse distribution of Fellows.
  - Communicate any late or missing arrivals to moderators.
  - One coordinator should leave dinner early to ensure the seminar room is set for dessert and evening discussion while the other stays at dinner to escort Fellows to seminar room.
  - Staff announcements at conclusion of session
    - What is in the welcome packet
    - When/where breakfast is

- Reminders about logistics for the team building exercises the following morning (i.e. – sunblock, appropriate clothing, tennis shoes, etc.).
- Will use WhatsApp or another messaging system throughout the week for logistical announcements/reminders – Ask the Fellows for a consensus on which one.
- Reminder about venture presentations (only if moderators have not already done so).
- Set up a group WhatsApp or other messaging system
- Share each person's final venture presentation slide with them electronically or by print.

## Day Two

- Daily Tasks
  - Check the seminar room.
  - Make sure coffee and tea are set up every morning before the seminar starts.
  - Ensure Fellows are arriving on time for morning sessions. If the Fellow has not arrived within 10 minutes of the beginning of the session, call their room or cell phone.
  - Use the tool decided upon to account for Fellows during key transition times – breakfast to first seminar session, lunch to afternoon seminar session, excursions, etc.
  - Check on meals and breaks 15 minutes before start time to ensure set up.
  - Arrive for dinner between 15 and 30 minutes early to ensure set up is complete.
  - Set out dinner table tents if the group needs some help mixing/bonding or if requested by moderators.
- Tasks specific for Day Two
  - Write the venture plenary presentation questions on one flip chart – See Venture Sessions Overview document for the 5 questions
  - Draw the **Motivation & Progress Matrix** on the other flip chart
  - Check that the AV works for projecting the PowerPoint slides for the plenary venture presentation session
  - Take notes during the check-in session. Download template for how to take notes [here](#) and upload to your seminar's folder on Basecamp.
  - Set up Team-Building with necessary materials. Lead exercises as needed.
  - Collect any outstanding payments for Spouse/Guest attendance.
  - Pass out colored dots for the Venture Presentation session while Fellows are at lunch
  - Staff Announcements

- Logistics and timing for the excursion on the following day (i.e. – clothing, water, sunscreen, etc.). If there is no break, remind them to come to the seminar ready for the excursion.
- Where dinner will take place that evening and if dinner is offsite, where and when they should meet for transportation.
- Slightly later start time for the next morning (8:30 a.m.) and remind them to bring Chinua Achebe books

## **Day Three**

- Daily Tasks
  - Check the seminar room.
  - Make sure coffee and tea are set up every morning before the seminar starts.
  - Ensure Fellows are arriving on time for morning sessions. If the Fellow has not arrived within 10 minutes of the beginning of the session, call their room or cell phone.
  - Use the google spreadsheet to account for Fellows during key transition times – breakfast to first seminar session, lunch to afternoon seminar session, excursions, etc.
  - Check on meals and breaks 15 minute before start time to ensure set up.
  - Arrive for dinner between 15 and 30 minutes early to ensure set up is complete.
  - Place dinner table tents if requested by moderators.
- Tasks specific for Day Three
  - Swap Table tents
  - Pass out the first round of Small Group Instruction Forms.
  - Write the first round of small working groups on a flip chart.
  - Staff Morning Announcement
    - Reminder about the excursion logistics and timing
    - Reminder of location for dinner and logistics if it is offsite
  - Coordinate logistics for excursion – transportation, guides, lunches, etc.

## **Day Four**

- Daily Tasks
  - Check the seminar room.
  - Make sure coffee and tea are set up every morning before the seminar starts.
  - Ensure Fellows are arriving on time for morning sessions. If the Fellow has not arrived within 10 minutes of the beginning of the session, call their room or cell phone.

- Use the tool decided upon to account for Fellows during key transition times – breakfast to first seminar session, lunch to afternoon seminar session, excursions, etc.
- Check on meals and breaks 15 minute before start time to ensure set up.
- Arrive for dinner between 15 and 30 minutes early to ensure set up is complete.
- Place dinner table tents if requested by moderators.
- Tasks specific for Day Four
  - Swap table tents
  - Write a second round of Small Groups assignments on a flip chart (on second or third sheet).
  - Pass out second round of Small Group Instruction Forms while Fellows are at lunch
  - Pass a contact sheet around to Fellows to get any updates to contact information. Update changes in Salesforce.
  - Staff Announcements
    - Reminder about Small Working Groups – when/where to go
    - Pass around contact details sheet and ask for updates
    - Announce where dinner is that evening and any necessary logistics
  - Remind your conference manager to give you your final bill and room folios the next day so they can be reviewed prior to guest check out and confirm ground transportation details with hotel staff.

## **Day Five**

- Daily Tasks
  - Check the seminar room.
  - Make sure coffee and tea are set up every morning before the seminar starts.
  - Ensure Fellows are arriving on time for morning sessions. If the Fellow has not arrived within 10 minutes of the beginning of the session, call their room or cell phone.
  - Use the tool decided upon to account for Fellows during key transition times – breakfast to first seminar session, lunch to afternoon seminar session, excursions, etc.
  - Check on meals and breaks 15 minute before start time to ensure set up.
  - Arrive for dinner between 15 and 30 minutes early to ensure set up is complete.
  - Place dinner table tents if requested by moderators.
- Tasks specific for Day Five
  - Swap table tents

- Send departure/transportation details via WhatsApp
- Test AV for videos to be shown during the Ventures Debrief session
- Prep handouts for the Debrief Session
  - What's Next Document
  - "Summit" (Action Forum Magazine)
  - Alumni Seminar Ad
- Staff Morning Announcement
  - Review the ground transportation schedule sent via WhatsApp and let staff know of any changes
  - Details on checking out: When/where to check out; where to leave bags, etc.
- Review rooming bills to ensure Fellows are charged for correct costs (i.e. incidentals)
- Take notes on Ventures Debrief
- Inform hotel of any changes to Fellows' departure information/needs.
- Ensure logistics are running smoothly for outdoor activity – transportation, guides, etc.
- Ensure logistics are ready for closing reception.
- Staff Announcements
  - Logistics reminder about the closing reception
  - Reminders about departures for the next day
  - Announce that you will be sending the survey the next morning and that time will be given during tomorrow's session to complete the survey. They must bring electronics of some sort to the next morning's session. Surveys must be completed online.

## **Day Six**

- Daily Tasks
  - Check the seminar room.
  - Make sure coffee and tea are set up every morning before the seminar starts.
  - Ensure Fellows are arriving on time for morning sessions. If the Fellow has not arrived within 10 minutes of the beginning of the session, call their room or cell phone.
  - Use the tool decided upon to account for Fellows during key transition times – breakfast to first seminar session, lunch to afternoon seminar session, excursions, etc.
  - Check on meals and breaks 15 minute before start time to ensure set up.
  - Arrive for dinner between 15 and 30 minutes early to ensure set up is complete.
  - Place dinner table tents if requested by moderators.

- Tasks specific for Day Six
  - Swap Table tents: Place Fellows on either side of the moderators strategically – ie, those that will model a good succinct but heartfelt check out should be first, while those that will give a strong, positive or uplifting check-out should be at “end”. Pick out 2-3 Fellows that fit each category.
  - Inform hotel of any changes to Fellows’ departure information/needs.
  - Send wrap-up email in the morning before seminar starts with: link to survey, electronic copy of What’s Next document, and an updated contact sheet for the group
  - Send internal evaluation link to staff and moderators
  - Take notes during personal checkouts.
  - Remind Fellows who are receiving Aspen Institute scholarship funds to write thank you notes to their donor.
  - Ensure boxed lunches are ready and transportation is arriving on time.
  - Tip the conference services manager/staff.
  - Pack up boxes and ship materials back.

## One to Two Weeks After

- **GENERAL** Work with Sam to save your photos from the seminar.
- **BUDGET** Pay seminar invoices and ensure that moderators are paid moderating fees and any reimbursements needed. Check their individual folders on Basecamp to find their moderating contract and correct payment information. Work with Olivia closely to execute.
- **WRAPUP** Remind Fellows who have not taken the survey yet to do so. One of the important pieces is the testimonials, given that donors need to be sent this information for scholarship recipients.
- **WRAPUP** / **MODERATOR COMMS** Summarize post-seminar evaluations and share with moderators before post-seminar call. All survey responses and summary documents can be downloaded from the Special Event Record. Be sure to also share these with Brianna, and the rest of the Globalization staff team. Also be sure Brianna has been invited to your seminar debrief call.
- **WRAPUP** Hold seminar debrief call. Use these guiding questions to run the call, and please compile your notes into a short summary page to be saved as part of the survey results.
  - What do you think went well and what did not go well?
  - Does anything surprise you in the survey results?
  - Were there any pain points you experienced?
  - How did the venues and offsites work?

- Is there anything you wish staff would have done differently? Anything you thought worked particularly well?
- Were there any Fellows that stood out to you? Were there any Fellows that you feel shouldn't have made it into the Fellowship?
- Are there any Fellows' ventures you think we should be watching? Any that you don't think live up to the AGLN standards?
- **WRAPUP** Update all data in Salesforce: changed contact info for Fellows, add final agendas, the compiled survey report and the final bill for the venue to seminar record, make sure all session data and readings moderator info is correct, etc.
- **WRAPUP** Compile the notes from check-in and check-out and venture sessions. Send Program Managers the notes for their respective Fellows. See [this template](#) for how to take notes.
- **WRAPUP** Send compiled survey results to Fellowship Teams no later than 1 month after the seminar
  - **WRAPUP** Send thank you notes and updates as needed to guests, scholarship sponsors, funders etc.
  - **MATERIALS** Unpack box of materials

### One Month After

- **BUDGET** Work with Olivia O'Neil to reconcile the budget. Setup a meeting with Olivia to review the General Ledger and ensure all items are accounted for and coded correctly.
- **BUDGET** Work with the moderators to process any reimbursements