FORUM PLANNING GUIDELINES, TIPS, AND REMINDERS

*This document is for planning purposes only. Nothing is set in stone and all new ideas are welcome! We hope it helps each Chapter with Region Forum planning; and we'll continue to improve the document after each Forum. If you have additional questions or need ideas/help, always feel free to reach out to Region 3 Leadership.

Typical Schedule:
- Day 1 – arrival day and evening networking event. (optional RWIEF fundraiser)
- Day 2 – Forum Business and evening networking event.
- Day 3 – Education (course or seminar) and departure day.
- Typically, Sunday-Tuesday or Wednesday-Friday. Mid-week is harder because people end up missing an entire work week.

General Planning:
- Work with R3 Leadership to determine your Forum dates.
- Dates need to be at least a few weeks after the IGC meetings, which are usually in September and Feb/early March.
- Spring Forum – March/April (dates to avoid/things to think about…spring breaks, Easter, other conferences)
- Fall Forum – October/early November (dates to avoid/think about…school breaks, Thanksgiving, hunting, other conferences)
- Talk with R3 Leadership and the Chapter who hosted the previous Forum for an estimate on number of attendees
- Create a planning committee within your Chapter who will work on the Forum Planning Details. Assign different roles/tasks/events to different people and have monthly calls for updates.
- Assume there will be last minute changes, cancelations, and requests. Be prepared to be flexible and go with the flow. Everyone will have fun no matter what!

General Planning Timeline:
- Have dates and location set to announce at the Forum before the Forum you are hosting. If possible, have a Save the Date flyer created, on Member Network, and Region 3 Website as well.
- Minimum of 3 months before – have final flyer created. (see Communication section for details). Upload to Member Network and send to Region 3 leadership.
- Minimum of 2 weeks before – send out any final details to confirmed attendees.

Location Details:
- Close to airport/hotel shuttle makes it easier for attendees
- Free (or easy) parking options for those that drive
- What is around the Hotel (makes it easier/cheaper if different events are walkable from hotel. Also, fun for attendees to have some places to explore/see the area).
- If you can find a venue (consultant, sponsor, etc.) who might be willing to let us use a conference room for free – that saves a lot of cost (if it is close to hotel)

Expenses/Payments:
- Forums can be expensive! Create a spreadsheet early on to estimate costs and keep track of them along the way. (room rental, food & beverage, transportation, social events, etc)
- Sponsorship Program from local consultants can help (Can sponsor an event or create a sponsorship package for the entire Forum.) If planning to have sponsors, get them early…one of the benefits of sponsoring something like this is to get your name/logo out there…so try to have them in time to add to Forum Flyers, etc. Get their logo from them also so it can be added to items. Often times, sponsors are invited to provide giveaways for attendees as well…not required but another way to get their logo in front of people and benefit from the sponsorship.
- Charging attendees – paypal, credit card, check, other (varies depending on overall cost, but usually between $50-$100/person.) Not all Chapters charge for a Forum, but just a small cost can help with accountability as well.
- Usually easier to charge one overall cost; instead of breaking it out into different options for those that will attend/not attend different events throughout.
- Create a spreadsheet early on to estimate costs and keep track of them along the way.
- If attendees will need to pay, note the payment method/link for payment on event flyer.

Attendee Accommodations:
- Get rates/options from multiple hotels to compare.
- Remember to ask not only about lodging rates, but also meeting rooms, catering menus/rates, minimums that must be met, etc.
- Average attendance to R3 Forums is 30-60.
- Most hotels will make you sign a contract to do a room block. Most contracts will hold the Chapter responsible for a percentage of rooms not used in the block. Hotels are usually willing to ADD rooms to a room block. When signing a contract, be sure that we can fill the room block so that the Chapter is not responsible for unfilled rooms. Talk with R3 leadership and past forum planners to get a better idea on lodging needs.
- The earlier this room block is advertised – the easier it will be for attendees to use it.
- Make sure on the Event Flyer (and Save the Date flyer if you know), the room block code is noted, as well as the date that the room block will close (usually at least a few weeks before arrival).

Food & Beverage:
- For Food & Beverage, local establishments can usually provide better quality AND cheaper vs. hotel. Some hotels will allow you to bring outside F&B in, but most will not. If hotel is close to restaurants/other options – it might be worth looking into going somewhere for lunch.
- Some hotels provide complimentary breakfast; which can save on costs. Other hotels (Drury, for example) has complimentary Happy Hour – which again, can save money on F&B expense.
- Keep in mind with hotel F&B, the cost ends up being about 25% more than the cost that is provided to you with all the additional fees.

Forum:
- Region 3 Leadership will create and provide sign-in sheets, power point, Forum agenda, and anything else needed for the actual meeting.
- Audio-Visual needs (screen, projector, microphone, owl – if doing virtual option, etc.) should be coordinated with R3 Leadership as far as what is needed.
- Most hotels/venues have an option rent their equipment, but it can be expensive. Check on option to BYO if available.
- Check with R3 Leadership on room set up requests.
- It is unknown how long the Forum business mtg with take - Plan for the entire day (8am-5pm).

Networking/Social Events:
- Past RWIEF Fundraisers have included basket raffles, 50/50 drawings, casino night or silent auctions. This is optional, but if you want to do something where people need to bring items, make sure to notify R3 leadership and Chapter leaders with enough advance notice so everyone can prepare.
- Having events close to the hotel eliminates the need for transportation to and from.
- Ideas – project tour, event, speaker, fun night, sporting events (check schedules as soon as they come out), Top Golf, etc.
- Something unique to the location is fun for people to experience
- Less is More – doesn't have to be an expensive or fancy event – We only see each other a few times a year, so something fun and simple is good too.
- Work with chosen venues on when they require food orders finalized, etc.

Education Course/Seminar:
- Typically planned for the day following the Forum.
- If you plan to hold a One-Day Education Course, work with your education chair to get the course planned. Will need a course coordinator and plan how you'd plan any other IRWA course (registration/payment for this will also be the same as planning any other IRWA course).
- If you plan to hold an Education Seminar, the planning will vary depending you what you want to do. Could do one speaker/topic…or break it up into multiple shorter sessions. Will need someone to coordinate with speaker/s for this.

Communication:
- All flyers and other information should be shared on Member Network (in the Region 3 Public Group) once they are finalized.
- All flyers and other information should be shared with Region Leadership and added to the Region 3 website.
- A "Save the Date" flyer should be created and advertised (as noted above) as soon as the general dates/location are known. If possible, have this prepared to present at the Forum before the Forum you are planning.
- Host Chapter should create an event on Member Network with event details.
- Host Chapter should email a "Save the Date" calendar invite on Outlook once the dates are confirmed. This helps the planning committee see tentative numbers and is also a good reminder of these dates for all attendees.
- Once final details are determined (minimum 3 months before Forum), create a more detailed flyer to include the following info:
  - o Location, date, and times for each event.
  - o Cost (if any) to attendees – and how to pay.
  - o Registration info/link.
  - o Hotel information (including room block code, if there is one)
  - o Contact information for any questions.
  - o IF asking attendees to bring basket raffle or silent auction item (or anything else), make sure that it is specified and clear on the flyer.
- Two weeks before Forum, send an email to all confirmed attendees with any additional info they should know. Post this information on Member Network as well. Include a spreadsheet of confirmed attendees.