

EVENTS & EXPERIENCES COMMITTEE PLANNING GUIDE



**LEADERSHIP
FLORIDA[®]**

Leadership Team Retreat
August 24-25, 2024
World Equestrian Center

EVENTS & EXPERIENCES COMMITTEE



AVA PARKER ▲

EVENTS AND EXPERIENCES CO-CHAIR

Palm Beach State College
Cornerstone Class 21
Gulfstream Region
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MATT UBBEN ▲

EVENTS AND EXPERIENCES CO-CHAIR

Confianza Consulting
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STAFF LIAISON

Morgana Nieves (mnieves@leadershipflorida.org)

COMMITTEE

Corina Velasquez (Calusa)

Jaymie Carter (Calusa)

Allison Kirby (East Central)

Dena Jalbert (East Central)

Audrey Ring (Gold Coast)

David Coddington (Gold Coast)

Imran Siddiqui (Gulfstream)

Nicole Plunkett (Gulfstream)

Diana Donovan (Northeast)

Melissa Lime (Northeast)

Tiffany Baker (Northwest)

Stacy Chambers (Northwest)

Norie Del Valle (Southeast)

Jose Cueto (Southeast)

Meredith Budd (Southwest)

Stephanie Kissinger (Southwest)

Kerra Kuzmick (West Central)

Kiana Romeo (West Central)

DESCRIPTION

The Events and Experiences Chair(s) will serve on the statewide Events & Experiences Committee. Each Region is expected to host four to five Region events per year, such as:

- New Member Reception
- Welcome Class Reception (if applicable)
- Recruitment Event (e.g., Virtual Application Workshop)
- “*but for Leadership Florida*” Event (e.g., VIP tour of a local attraction)
- Learn & Lead Event
- Social Event (e.g., holiday event, end-of-year sunset cruise)
- Education Event

The Events & Experiences Committee should consider at least one true “*but for Leadership Florida*” Experience. Committee Members may refer to the ongoing Region Unique Places, People, & Experiences List for inspiration. Additionally, the Events & Experiences Co-Chair(s) work closely with the Fundraising Chair and the Recruitment Chair in planning events and the Communications Chair in promoting the events. Lastly, select a Learn & Lead Chair to assist with events where members can receive personal or professional growth and inspiration. Meetings will be held quarterly, beginning in October.

EVENTS & EXPERIENCES COMMITTEE

REGION EVENT PROCEDURE

The Events & Experiences Chair(s) will:

- Contact Morgana Nieves for approval of your proposed event date
- Once the date is confirmed, submit the Event Planning Form at least four weeks before the date of your event
- Monitor registration with the RSVP link in your Leadership Florida Member Compass
- Collaborate with the following Region committees:
 - Communications Chair(s) to distribute event information via the Region's Facebook page
 - Fundraising Chair(s) to determine funding needs per event
 - Education Chair(s) on education-related event planning
 - Recruitment Chair(s) on recruitment event planning
- For in-person events, you will print the sign-in sheet, sponsor signage, and name tags for event attendees (electronic files provided by Leadership Florida staff)
- Following the event, submit the event attendance numbers via the Post-Event Form and work with the Communications Chair(s) to submit event photos

Leadership Florida staff will:

- Provide event approval
- Draft an event invitation and send it to the Events & Experiences Chair(s) to approve within three days of receipt
- Distribute the invitation by email
- Distribute event evaluation surveys post-event
- Assist with vendor payments and reimbursements
- Ensure all communications follow Leadership Florida guidelines to protect future email deliverability

TIME COMMITMENT & TIMELINE

September 2024	Plan Events for the year
October 1, 2024	Submit New Member Event Date for approval
October 14, 2024	First Committee Meeting – Noon - 1:00 pm ET
November 2024	Host New Member Event
November 20, 2024	Northwest Region- Connect Class 14 Class Reception (Tallahassee)
December 11, 2024	Northeast Region- Cornerstone Class 42 Class Reception
December 2024 – January 2025	Host Recruitment Event
February 13, 2025	Virtual Leadership Team Retreat at 10:00 am – Noon ET
February 24, 2025	Committee Meeting – Noon - 1:00 pm ET
March 5, 2025	West Central Region- Cornerstone Class 42 Class Reception
March 26, 2025	East Central Region- Education Class 9 Class Reception (Orlando)
April 22, 2025	Southeast Region- Cornerstone Class 42 Class Reception (Miami)
June 5 – 8, 2025	Annual Meeting – JW Marriott Tampa Water Street

**If you are unable to attend a committee meeting, secure a council representative to represent the Region (e.g., Region Chair)*

EVENTS & EXPERIENCES COMMITTEE

EVENT PLANNING CHECKLIST

New Member Event

- Have council members introduce the new members (e.g., read a brief bio, two to three sentences on each new member)
- Select a venue that provides proper acoustics for introductions
- Display sponsor signage
- Display name tags for members
- Recognize Council Members, Board in attendance
- Thank sponsors
- Share a Save-the-Date for an upcoming Region event
- These events are intended for Leadership Florida Region Members only

Recruitment Event

- Provide application date window
- Describe all three programs (Cornerstone, Connect & Education)
- Provide QR code with Intent to Apply link (*optional*)
- Display sponsor signage
- Display name tags for members
- Recognize Council Members, Board, Lifetime Members in attendance
- Thank sponsors
- Share a Save-the-Date for an upcoming recruitment event
- These events are intended for Leadership Florida Region Members and interested candidates
- Utilize Calendly or similar software to schedule one-on-one meetings with candidates and council members (*optional*)
- Application Tips document
- Recruitment presentation available

Welcome Reception Event

- Select a venue that provides proper acoustics for introductions
- Display sponsor signage
- Display name tags for members
- Recognize Council Members, Board, Lifetime Members in attendance
- Thank sponsors
- Share a Save-the-Date for an upcoming Region event
- These events are intended for Leadership Florida Region Members only

Holiday Events

- These events are intended for Leadership Florida Region Members; guest(s)* can be invited if the budget allows
- Thank sponsors
- Share a Save-the-Date for an upcoming Region event

Legislative Events

- Reach out to Region legislators for panel participation
- Must be bi-partisan
- Leadership Florida panelists/moderators should be active, dues-paying members
- These events are intended for Leadership Florida Region Members only

*What is a guest?

- Spouse/significant other
- Spouse and children
- Potential candidates (*for recruitment events only*)

IMPORTANT LINKS

- Leadership Team Resource Hub: leadfla.com/hub
- Leadership Florida events page: leadfla.com/events
- Region Event Planning Form: leadfla.com/event-plan
- Post-Event Wrap-Up Form: leadfla.com/event-wrap
- Payment Request Form: leadfla.com/payment

REGION EVENT POLICY

A. Purpose

Each program year, Region Councils may host: 1) a New Member event for local participants in the current Cornerstone, Connect, Education, and Executive Class programs, 2) a recruiting event for those Class programs, and 3) a Welcome event for the current class of Cornerstone, Connect, Executive, and Education programs if such a program is held in that Region. Regions may also choose to host additional events for members, including “*but for Leadership Florida*” experiences. This policy outlines requirements for hosting all Region events.

B. Requirements

- 1. Approved:** All events must be approved by Leadership Florida staff, who will take into consideration the criteria below as well as the Statewide events calendar.
- 2. Mission-Driven:** Events must advance one or more elements of Leadership Florida’s mission to (a) discover and convene committed individuals, enhancing and recharging their leadership skills by introducing them to a powerful community through whom they find knowledge and inspiration, (b) engage Floridians by providing essential information and a meaningful forum for their opinions, and (c) create opportunities for shared experiences that are inviting, inspiring and of lasting value.
- 3. Cost-Conscious:** Events must be affordable and not pose a financial risk to the organization. Events that maximize Leadership Florida’s social capital to keep expenses low are preferred. Regions may seek sponsorship support from non-Statewide Sponsors as provided in Policy 402 on Sponsorship/Fundraising with permission from the President and CEO or their designee. Resources required must be committed with adequate time for planning and approval by Leadership Florida. Funds identified for a specific event must remain in that Region’s account and cannot be transferred for another use without the approval of the President and CEO (see Policy 402.) The total funds raised for a single event, not including in-kind donations, may not exceed \$10,000 without advance approval from the Executive Committee. Region event planners must notify Leadership Florida with ample time to request such approval.
- 4. Non-Partisan:** Events must avoid advocacy, embracing partisan or political dogma or viewpoints or create the impression that Leadership Florida is engaged in said behavior such that it would jeopardize Leadership Florida’s status as a 501(c)(3) tax-exempt entity. If the event involves discussion and debate on one or more issues of public importance, the event must be organized so that (a) the presenters or facilitators involved in the discussion be inclusive of the spectrum of viewpoints and, whenever appropriate, have representation of both major political parties or related entities and (b) the content of the discussion is fair, balanced, non-partisan, non-advocacy and educational (see Policy 504.)
- 5. Sensitive:** Leadership Florida members serve in over 5,000 nonprofit organizations statewide, all doing valuable work to enhance the quality of life in our state. Our organization strives to not promote one nonprofit over another. Instead, Leadership Florida encourages personal service by its members. Fundraising for other organizations is prohibited (see Policy 409.)
- 6. Low-Risk:** Leadership Florida staff will not sign contracts obligating the organization to pay funds that are not already committed. Leadership Florida has an umbrella policy that provides basic event insurance. For venues requiring higher levels of coverage, Leadership Florida may obtain a special event rider, the premium for which will be charged to the host Region.
- 7. For Members:** Attendance at events is generally restricted to members who are current on their dues. There may be exceptions, i.e. holiday gatherings, where members’ families may also be permitted to attend, or when the event is designed to re-engage inactive members.

At the end of each fiscal year, unused Region funds will be placed in Leadership Florida’s unrestricted net assets to strengthen the future financial health of the organization.

Event Name
Event Date
Location
Region
Contact Name & Email

Task	Staff	Timeline	Region Role	Committee
Discuss event date and details with Morgana	Morgana Nieves		Verify available date with Morgana	Events & Experiences Committee
Event Date Approved	Morgana Nieves			
Certificate of Insurance Needed?	Morgana Nieves		Determine with venue	Events & Experiences Committee
Planning Form	Morgana Nieves		Submit Planning Form	Events & Experiences Committee or Communications Committee
Event Created on Website	Leadership Florida Staff	Please allow 3 days after form submission		
Zoom Link Created (if needed)	Leadership Florida Staff			
Power Point Created (if needed)	Leadership Florida Staff			
First Invitation Created and Sent	Leadership Florida Staff	Please allow 3 days after form submission	Verify invitation details. Draft will be sent before sending out.	Events & Experiences Committee or Communications Committee
Notify Region of Dates planned for invites	Leadership Florida Staff			
Post Event Information to Facebook Region Group	Region Communications Chair(s)		Post event to region group	Communications
Reminder Invitation	Leadership Florida Staff	Typically 1/2 way between first and final	Notify of any changes ASAP so changes are included	
Final Invitation	Leadership Florida Staff	3-7 days prior to event	Notify of any changes ASAP so changes are included	
Post-Event Eval Email Scheduled	Leadership Florida Staff	15 minutes post-event		
Nametags & Attendee List Created	Leadership Florida Staff	24 hours pre-event	Digital file	
Nametags & Attendance Sheet Emailed	Leadership Florida Staff	24 hours pre-event		
Take pictures at event - don't forget a group shot!	Region Communications Chair(s)			Communications
Pictures Posted to Region FB Group	Region Communications Chair(s)	Within 48 hours	Communications post to region Facebook group	Communications
Post-Event Follow-up	Morgana Nieves	Next business day		Staff & Event Contact Person
Post-Event Follow-up Form	Leadership Florida Staff	Within 48 hours	Region to complete	Event Contact Person
Attendance Count Received	Leadership Florida Staff	Within 48 hours	Include in post-event form	Event Contact Person
Reimbursements Requested by Region	Region Events Chair(s) or Contact	Within 48 hours	Include in post-event form	Event Contact Person
Pictures Received	Region Events Chair(s) or Contact	Within 48 hours	Include in post-event form	Event Contact Person
Pictures Posted to Online Photo Album	Leadership Florida Staff	Within 3 business days		
Speaker Thank-You letters (if applicable)	Region Council members			Events & Experiences Committee or Communications Committee
Expenses Paid	Morgana Nieves			



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