**Philanthropy New York   
Program Planning Checklist**

**September 2012**

**Initial Development (PNY staff independently):**

* Staff Lead has been determined
  + \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(Please fill name here)
* Lead Organizer has been determined
  + \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Please comment who and contact info)
* Date and location have been finalized
  + \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Please specify where and what time range)
* Conference@philanthropynewyork.org has been emailed to reserve the space, if the meeting is at PNY
* The time, appropriate color, and information has been entered and saved onto the working calendar. Please make sure any dates not needed are removed
* Outreach to speakers (please comment each person reaching out to each speaker)
* Main contact for the speakers (if not PNY, ensure we have emails for adding them to the database and to send post-program thank you)
* Date of initial planning meeting/teleconference (FINAL PLANNING CALL SHOULD BE NO MORE THAN THE 3RD CALL)

**PLEASE KEEP IN MIND:**

* Networks, Working Groups, and Co-sponsors identified as potential partners and/or collaborators? The more the richer/merrier!
* Individualized personal invites from Ronna or a Board Member to help with outreach?

**Final Planning Call (PNY Staff w/ a LS staff):**

* Go over and type notes for the group on
  + Desired program outcomes
  + Intended audience
  + Discuss different types of “openness charts” & which will be the guide
  + Ask all speakers to think about what colleagues or organizations should be in the room and who they can reach out to
  + Notify all the speakers about our strict no-solicitation policy
  + Ask if speakers or organizer have any "program related materials" that should be uploaded to the website and/or printed out
  + Ask speakers to mail or bring any hard copies of handouts (for the registration table) to the Staff Lead
  + Mention to speakers on planning call about an opportunity to blog for "Smart Assets"
    - Email to connect them to Yves
  + If you think it’s appropriate, ask speakers if they are interested in [using Twitter as a program tool](file:///R:\WEBSITE\SOCIAL%20MEDIA%20RESOURCES\Twitter\Program%20Tweeting%20Guidelines.docx) (R:\WEBSITE\SOCIAL MEDIA RESOURCES\Twitter\Program Tweeting Guidelines.docx) to promote the program and/or engage the audience.
  + Update them on registration and outreach that will happen before the program – will that be enough?
* Program moderator/facilitator
  + \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(Please comment who)
* Establish the program format
  + \_\_\_\_\_\_\_\_\_\_\_\_(Please comment about details or attach planning call notes)
* **Finalize during the planning call: how the topic will be framed, vehicles for audience participation/interactions, order of speakers, content and length of each presenter's remarks**
* Send planning call notes to all those on the call and involved
  + \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(If someone else sent please comment who)
* Are there any PowerPoints? Make sure they are send to us (Beeta and Sandra) 1 business day before the program so we can upload and test it
* Will we be doing (check all that apply):
  + the registration
  + name tags
  + roster
  + speaker table tents
  + Other:\_\_\_\_\_\_\_\_\_\_
* Are we catering anything more than coffee?
  + \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(If yes, who has offered to pick up the tab?)

**Welcome:**

* Is there any Board Member or pre-designated person to do the welcome on behalf of PNY?
  + \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(If yes, please put their name here)
  + We have a “welcome cheat sheet” that can be used for asks

**Program Prep (LS staff):**

* Gather bios and send to Sandra to be posted to the website
* Send a reminder to the speakers 1-2 days before the program including the roster and time/location
* Make sure a Board Member or staff person is doing the welcome –send them “Welcome Cheat Sheet”
* Has the program description been written and sent to the speakers/or reviewed and sent with edits to the author(s)?
* Is the program part of a series? If so, which?
* Program description posted - no less that 6 weeks before the program (please comment who and date)

**The Aftermath (PNY & LS Staff):**

* Thank yous to speakers and lead organizer (within 24 hours)
* If there were catering changes send a reimbursement form with the original receipts to the appropriate contact
* If still applicable, connect blogger with Yves
* Code receipts and submit to Daisy (make sure to keep a copy)
* Put away an easels or materials brought into the room for the program

R:\PROCESS MEMOS\Learning Services\Producing a Program, for PNY Staff

**Questionnaire for PNY Staff – AFTER THE PROGRAM**

1. How did you find the program:
   1. Interesting
   2. Boring
   3. Other: \_\_\_\_\_\_\_
2. Was the format that was chosen right and best for the content?
   1. Yes
   2. No
   3. Comment:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. Did you get anything out of planning this program?
   1. New knowledge on the issue
   2. Met a new member
   3. A new idea for work
   4. Other:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   5. Comment\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Thank you so much for leading this program!