

## Facilitation and Executive Note Taking Expertise

Attendee Number: 100 persons

Location: Atlanta

Type of Location: Hotel

The meeting for the Government Agency was a specialized, invite only event that required careful planning and coordination. The GA Team provided four facilitators for this two day event, provided expert note takers for all sessions and handled all travel arrangements for non-government guests; in addition to all meeting and event planning logistics.

### Highlight of Challenges encountered and How These Challenges were Met:

**1. Individualized Invitations:** The individuals that were being asked to attend this event were hand selected by the conference coordinators. It was important that these individuals received a personalized invitation to attend this event and that they received excellent customer service throughout their entire experience. The hope was that these individuals would become engaged in the plans of the Government Agency and become a part of their working group to help with future projects.

This personalized service meant that the GA Team spent a significant amount of time working with the Government Agency with personal telephone calls and reaching out to registrants. Prior to arriving onsite, we really knew each of the attendees very well. Especially because we were also responsible for making their travel arrangements.

**2. Hotel Space:** The plans for this meeting didn't get started as quickly as the Government Agency had hoped and by the time they brought the GA Team into the plans, they were very late with their site selection. We had a very difficult time finding a hotel in Atlanta for them, and an even harder time negotiating a good rate as their options were limited. However, we refused to give up and continued to negotiate with the hotels until we found the best deal possible. From there, we expedited the plans and moved very quickly into setting up the website, getting the personalized invitations ready and moving swiftly into executing this conference.

### Key Requirements Addressed in this Case Study:

- I. Speaker Support and Coordination
- II. Arranging Travel for Non-Federal Speakers and Facilitators; Prompt Reimbursement
- III. Facilitation Expertise
- IV. Providing Staff for Note Taking and Record Taking
- V. Pre and Post Activities
- VI. Setting up and maintaining conference websites

**Speaker Support and Coordination:** Another key component for the Government Agency Conference was Speaker Coordination. If speaker guidelines are specific as to what AV equipment is provided, additional costs can be avoided for speakers who decide they need audio for their Power Point presentations when they arrive. Every one of these changes costs \$200 plus!

For the Government Agency, we worked with the organizers to make sure that speakers understood what AV was available; that they met their deadlines for getting in their presentations; loaded their presentations on the computer in the room where they were presenting (this avoids the time consuming and frequently difficult process of connecting each speaker's own computer to projection equipment); we made sure any authorized presentation changes were captured on the master computer file and loaded for presentation; and finally provided organizers with a thumb drive containing all of the final presentations within hours of meeting conclusion.

**Arranging Travel for Non-Federal Speakers and Facilitators; Prompt Reimbursement:** For the Government Agency Meeting, we were responsible for arranging travel for Non-Federal guests. By using our established per diem travel and reimbursement form, the GA team arranged all travel for speakers in accordance with current Federal JTR. Working closely with our Government Contact, all confirmed attendees received a copy of our GA customized travel form; which helps our team make all travel arrangements and provide individualized attention. For those choosing to make their own arrangements, we distributed a document that outlined the JTR requirements.

Our experience shows that speakers wish to receive their fees and/or reimbursements in a timely fashion. Not only did GA settle all reimbursement requests within two weeks of receipt; our staff also provided forms to each attendee while onsite – to make submitting his/her reimbursement as efficient as possible. For many, they had all the documents they need for reimbursement when they arrived. Our onsite staff was present to answer any of their questions and help them with these documents.

**Facilitation Expertise:** Giuffrida Associates has over fifteen years of extensive facilitation knowledge and is experienced at helping groups succeed. For the Government Agency Conference, we had four facilitators onsite, facilitating a two day session for this agency. The GA team puts careful consideration and thought into managing the group's goals and plans. Through small group exercises to large group report outs, the GA team customizes a strategy to best fit the client needs and help them fulfill their goals. The services help to foster open communication and teamwork within the working group.

**Providing Staff for Note Taking and Record Taking:** Our note takers and transcribers have extensive experience in technical editing and creating high-quality reports. Another key role we played for the Government Agency Meeting was to manage the summary notes for the meeting. This was needed in each of the breakout rooms and in the general session. Each report contains several sections including, but not limited to meeting context, key themes, key learnings, discussion points, action items, and speaker biographies. Based on the client and audience, the transcribers are able to create a meeting report that meets their specific needs and these reports are often used as a foundation for future meeting and planning.

We recognize the importance of note taking. Summaries of meetings are a critical piece to bring closure to meetings and prepare for the next steps. GA understands the value of meeting summaries and ties this closely with our facilitation experience.

**Pre and Post Activities:** As mentioned in earlier case studies, we use our *Management Plan* system for the Government Agency planning as well. The *Management Plan* outlines every specific deadline, deliverable, and the persons responsible. This becomes the key agenda item during the initial meeting as

the GA POC and the Government Agency POC hold their first meeting to discuss expectations, working together, and overall plans for the meeting.

We schedule the post-evaluation meeting almost immediately following the conference, while the event is still fresh in our minds. During that meeting, the GA POC and the leadership from the Government Agency come together to highlight areas that worked well and brainstorm innovative ideas for future ways to make the conference even better.

**Setting up and maintaining conference websites:** For the government agency, we designed and hosted their conference website. The required website had to present basic information on the Conference and making reservations as well as area restaurants and attractions plus transportation options from area airports. Furthermore, the website provided an easy registration process for individuals. The registration page needed to capture name and complete contact details. All of this data was captured in an excel spreadsheet that is available 24/7 to the Government Agency POC.