



# Convening Planning Toolkit

Convening your existing and potential stakeholders is a critical first step to successfully narrowing the digital divide in your community. It is also a great way to introduce yourself to community groups you may not have worked with and establish ways in which you might be able to collaborate. See *Playbook Chapter 4: Organizing a Local Convening* for more information.

Ultimately, your convening allows you to present your ConnectHomeUSA goals and engage key community organizations, existing partners, and your residents in the process of developing your Action Plan. See *Playbook Chapter 4: Organizing a Local Convening* for more information.

## Steps for Planning Your Local Convening

Once you have established a rough agenda you can begin outreach to invitees. Your agenda does not have to be fully finished but you should share high-level detail in your invitations so invitees will have an idea what to expect.

### ■ Develop Your Launch Plan

Developing your Launch Plan prior to organizing your convening is an effective first step. This will help you:

- Identify your Target Population
- Establish focus areas
- Identify organizations/stakeholders currently working on these issues in your community and who could be invited to attend your convening
- Develop a Core Planning Team and internal staff roles and responsibilities

*Check out the Launchpad Toolkit for more information.*

### ■ Identify Goals for Your Convening

Once you have your project goals and Core Planning Team established you can begin goal-setting for your convening. [The primary purpose of your first ConnectHomeUSA convening is to mobilize a diverse group of organizations to help you bridge the digital divide in your community.](#) Subsequent convenings can be organized to expand your project. Please refer to *ConnectHomeUSA Playbook Chapter 4: Organizing a Local Convening* for more information.

Consider the following questions when outlining your goals:

- 1. What role or contribution do you expect of each invited organization?**
- 2. What are key takeaways you want the attendees to leave with?**
  - a. A better understanding of the digital divide in your community
  - b. Existing resources
  - c. Your overarching goals
  - d. Ideas for how local stakeholders can collaborate
- 3. How will you involve residents?**
  - Invite resident councils
  - Invite resident leaders
  - Include organizations that serve residents in your invite list

#### S.M.A.R.T Goals

Use the S.M.A.R.T framework when setting goals for the event. This means making sure your goals are **S**mart, **M**easurable, **A**ttainable, **R**ealistic, and **T**ime-based.

The SMART Goal Planning Template in the *Virtual Event Planning Toolkit* can be used here as well.

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## ■ Outline Key Planning Activities and Due Dates for Core Planning Team

Once the goals for the convening have been established, the Core Planning Team can begin outlining key activities, milestones, and staff roles and responsibilities. Throughout this checklist document you will find high-level activities that are crucial to planning a convening. Use these to help you plan and to make sure you do not miss key items.

You can use the companion *Convening Project Plan Template* to create your own personalized plan!

## ■ Develop Invitation List

During the Launch Plan process, you should have created a list of potential stakeholders. Invite them to your convening and while you are at it, ask them to invite other organizations they work with that could be interested in supporting your ConnectHomeUSA efforts.



### Potential Invitees

#### RESIDENTS

- Resident groups and leadership

#### GOVERNMENT

- State and local elected officials
- Public housing agency leadership and staff
- HUD staff
- Libraries
- School districts
- City agencies, such as economic development departments

#### BUSINESSES AND NONPROFITS

- Internet Service Providers
- National ConnectHomeUSA stakeholders
- Device providers and refurbishers
- Technology community
- Local media
- Local banks
- Local educational, or other service-oriented nonprofits (e.g. women's organizations)
- Local businesses and employers
- Owners of HUD-assisted multifamily properties
- Colleges and universities

#### FUNDERS

- Prominent foundations, your community foundation and other local funders



## Location, Location, Location

Once you have established your goals and invitees, you should identify the location for your convening. A few things to consider when you are selecting a location include:

- A central location for all your stakeholders/attendees with convenient access to public transportation or parking
- Try to make it a neutral location where all attendees will feel comfortable and welcome
- If possible, use this opportunity to highlight a key stakeholder by hosting the event at or near their location
- Ensure that the space you choose has Wi-Fi and other technology that you will need for your convening
- Make sure that the space is handicap accessible
- Do not forget to arrange transportation for any residents that may need it
- Virtual convenings: During COVID-19, many communities opted to conduct convenings virtually. Check out the *Virtual Event Planning Kit* for tips and best practices.



### Example Convening Locations

- ➔ Public Housing community space
- ➔ At-large community center
- ➔ Library
- ➔ Higher education campus
- ➔ Workforce center space
- ➔ Civic space
- ➔ Space available at or near a stakeholder's location



**Tip:** Make sure to include information about public transportation and parking for attendees in advance to make arrival as easy as possible. Also make sure to provide information about where in the building the event is taking place (i.e., third floor auditorium). On the day of your event make sure to have directional signs to help attendees find the event location.

## Set Your Agenda

The meeting agenda should reflect the goals of your convening. A few key steps for setting your agenda include:

- What key topics do you want to hit? Refer back to your goals for the Convening and your Launchpad Plan to make sure that your agenda reflects your Core Planning Team's agreed-upon topics.
- Plan breakout sessions that address the three-legs of the digital opportunity stool and any other quality-of-life goals your initiative may have.
  - ➔ The convening should be structured in an interactive, participant-oriented manner with activities for each table/committee.
- Convenings are generally half-day events, but this can be adjusted based on your goals.
- Make sure to include time at the beginning of the convening for an interactive icebreaker, to explain how the convening will run, and any expectations for participants.
  - ➔ It is also a good idea to include a trust-building exercise or ice breaker early in your convening to better facilitate conversation among attendees and stakeholder groups.
- Keep your measurable outcomes in mind.
- Include breaks and time for snacks/meals.



**Tip:** Identifying a skilled and knowledgeable facilitator. The facilitator can be housing authority or stakeholder staff.

*For tips on how to be an effective trainer, see the **Virtual Event Planning Toolkit**.*



### Ice Breakers Tips

- Ask simple questions that reveal interesting information. Use humor or a humorous activity.
- Have people talk one-on-one or in small groups. One-on-one and small group interactions may build more connection than conducting an icebreaker with the entire group.



## ■ Develop Convening Activities

This should be considered part of the agenda-setting process. Managing a large group of participants and capturing commitments can be difficult, so as you develop your agenda, break up your invitees into smaller working groups. Use the following tips to help you:

- **Organize working groups around your goals.**
  - ➔ Examples include: Connectivity, Digital Literacy Training, STEM, Resident Engagement, etc.
- Each group should include representation from a variety of stakeholders.
- Have a notetaker from the Core Planning Team at each table to capture information shared for later use. Each notetaker should be equipped with printed Commitment Forms to share with table mates at the appropriate time.
  - ➔ A sample commitment form is included as a part of this toolkit.

## ■ Invite Participants

Your agenda does not have to be final before sending invitations. Just make sure your invitation includes high-level themes or topics and/or any important speakers to spark recipients' interest.

- Personal invitations from your Executive Director or other member of your leadership team will convey the importance of your initiative.
- Send out invites 2-3 months in advance of the convening.

Include an online registration link. Popular platforms for online registration include:

- Eventbrite
- Ti.to



**Check registration numbers regularly so you can send reminders as needed.**



**Tip: Invite Local Media.** Media attention can help garner additional support for your efforts by reaching a wide audience. Target media outlets such as local papers, radio and TV stations to let them know about your convening and the goals of your ConnectHomeUSA initiative. On the day of your convening, have a fact sheet with contact information handy, and if possible, someone from your public affairs office.

You may want to limit media attendance to a specific window of time to allow for a freer exchange of ideas. Insert a note in the agenda to let participants know when the media will be joining.



## Finalize Logistics and Create a Convening Run of Show

A run-of-show document lays out the order of events and other important information. This document is key to a successful event and should be distributed to all Core Planning Team members. It should include the following information:

- **Run-of-Show should include:**
  - ➔ Agenda with staff roles and responsibilities
  - ➔ Timing for each speaker
  - ➔ Computer logon information
  - ➔ Any other information that would be helpful for presenters
- **Key venue details and contacts**
- **Venue considerations:**
  - ➔ Access information
  - ➔ Floorplan
  - ➔ Parking Information
  - ➔ Internet/Wi-Fi
- **Key Housing Authority staff contact information**
- **Other Contacts:**
  - ➔ Venue manager
  - ➔ Catering/refreshments contact
  - ➔ MC contact info
  - ➔ Keynote speaker info
  - ➔ Presenter info
  - ➔ Audio visual aid contact info
  - ➔ Transportation information
  - ➔ Photographer info
  - ➔ Media contacts

A *Run-of-Show Template* is included in this toolkit and can be adapted to fit the needs of your specific event.



## Send Out Reminders Before the Event

Two weeks before your event you should send out a reminder email with key information for attendees. You can send this email out again the day before the event. Make sure to include the following information in your reminder emails:

- Finalized Agenda
- Expectations for the event
- Venue arrival information
- Contact info for any questions
  - ➔ Email/Phone number of staff person designated to handle day-of questions

## Day of the Event

All your hard work has paid off and the event is here! Remember to enjoy yourself and consider these day-of tips:

- Core Planning Team should arrive early and complete set up
- Make sure the Core Planning Team has a copy of the Run-of-Show document
- Place copies of the agenda at every seat
- Enjoy yourself!





## Event Evaluation

It's a good idea to leave time for an evaluation at the end of the convening. The evaluation can be done using paper surveys and/or one of the various online surveying platforms including:

- SurveyMonkey
- Microsoft Forms
- Google docs

## Event Follow-up-

The point of the convening is to generate interest and momentum around your ConnectHomeUSA program. Do not let the momentum die by waiting too long to follow-up. Tips for following up:

- Follow-up with organizations who left without signing a commitment form – is there additional information you can provide?
- Set up a debrief meeting for the Core Planning Team after the event.
  - ➔ Assign follow-up tasks to available staff
- Thank attendees for participating with a “thank you” social media post where you advertised the event or by email. Make sure to provide links to materials that you shared at the event.
- Send individual thank you notes to your speakers.
- Follow-up with stakeholders who expressed interest in making a commitment:
  - ➔ Set up regular meetings with newly committed stakeholders
  - ➔ You want to create a sub-committee structure around the three-legs of the digital opportunity stool
  - ➔ Collect data on best times to schedule future meetings



### Post-Convening Sample Survey Questions

- Overall, how would you rate the event?
  - ☐ Excellent
  - ☐ Very good
  - ☐ Good
  - ☐ Fair
  - ☐ Poor
- What did you like about the event? (open answer)
- What could we do better next time? (open answer)
- How was the duration?
  - ☐ Much too long
  - ☐ Too long
  - ☐ About right
  - ☐ Too short
  - ☐ Much too short
- Is there anything else you'd like to share about the event?

## Sample Agendas:

### ConnectHomeTucson Sample Agenda



### ConnectHomeTucson Convening Agenda

March 25, 2021 | 9:00 - 11:00 a.m.

9:00 am - 9:10 a.m.	<b>Welcome and Introductions</b> - Vice Mayor Nikki Lee
9:10 am - 9:15 a.m.	<b>What is ConnectHomeUSA?</b> - Lacia Sommars
9:15 am - 9:25 a.m.	<b>ConnectHome in Tucson</b> - Liz Morales
9:25 am - 9:40 a.m.	<b>Digital Opportunity Best Practices</b> - Mick Salik and Jared Frank
9:40 am - 9:45 a.m.	<b>Breakout Session Intro</b> - Alison Miller
9:45 am - 10:10 a.m.	<b>Breakout #1: Definition and Goals</b> - Facilitators
10:10 am - 10:15 a.m.	<b>Break/Session #1 Intro</b> - Alison Miller
10:15 am - 10:40 a.m.	<b>Breakout #2: Resources and Next Steps</b> - Facilitators
10:40 am - 11:00 a.m.	<b>Report out and Close</b>



## Sample Agendas:

### Madison Digital Opportunity Summit Agenda

#### Madison Digital Opportunity Summit

Monday, February 10, 2020

10:00 AM – 12:00 PM

Madison Central Library  
201 W Mifflin Street  
3<sup>rd</sup> Floor  
Madison, WI

#### AGENDA

9:30am – 10:00am	Continental Breakfast	
10:00am – 10:10am	Welcome and Opening Remarks	<b>Deborah Rakowski</b> , Madison Community Development Authority (CDA) Deputy Director <b>Mayor Satya Rhodes-Conway</b> , City of Madison Mayor
10:10am – 10:25am	ConnectHome USA Overview	<b>Dina Lehmann-Kim</b> , ConnectHome USA Manager, PIH, HUD
10:25am – 10:40am	Digital Opportunity Landscape	<b>Alyssa Kenney</b> , Public Service Commission of Wisconsin Director of Digital Access
10:40am – 11:40am	Roundtable Discussions	Group Facilitators located at each table
11:40am – 11:55am	Large Group Report	Designated group member
11:55am – 12:00pm	Next Steps and Closing	<b>Sarah Edgerton</b> , City of Madison Information Technology Director





## Sample Agendas:

### Jersey City Housing Authority Sample Flyer

**We invite you to join Jersey City Housing Authority as we bring together stakeholders to usher in a new era for Digital Inclusion.**

**Digital Inclusion** is about more than just access to computers. Digital Inclusion represents:

- **Freedom** – the ability for a wheelchair bound senior to video chat with relatives in a distant county that they haven't had the means to speak to for decades.
- **Opportunity** – the means for a job seeker to search for the career of their dreams and to have the digital skills that 80% of employers require.
- **Justice** – bridging the unacceptable divide between affluent communities where 97% of households have full internet connectivity versus public housing communities where this exists for only 1/3 of residents.
- **Educational Equity** – the tools to close the achievement gap in an era where ¾ of teachers assign homework that requires the use of internet.

*Digital Inclusion empowers the community.*



As part of its **ConnectHome** commitment to bridge the digital divide, JCHA partners with organizations to promote access to technology, high-speed internet, and digital literacy trainings. We invite you to help shape the next chapter of this effort, lending your voice and talents to make this a reality. Please join us at our upcoming event:

**2<sup>nd</sup> Digital Inclusion Convening**  
**Friday, June 14**  
**10am – 1pm**  
**Mary McLeod Bethune Center**

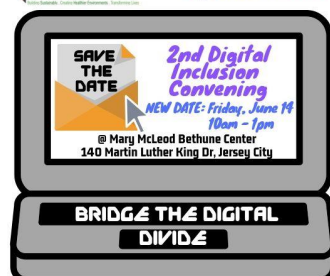
The address for the Mary McLeod Bethune Center is 140 Martin Luther King Drive in Jersey City, NJ 07305. Breakfast and refreshments will be served. There is a free parking lot across the street from the Center's entrance. On street parking is also available.

[Click here](#) to RSVP or call 201-706-4637



If you have not registered yet, you should consider doing so if you or your organization:

- are interested in learning how to use technology for **educational enrichment, workforce development & opportunities for seniors**
- have **public computers or digital skills programs** open to the community
- use **digital tools** in a useful way that you would like to share
- are interested in learning how to **improve your programs** by leveraging the power of connectivity and digital resources
- want to **network** with forward thinking leaders
- are passionate about **helping others** and promoting equality of opportunity





**ConnectHomeUSA**