



Summit Planning Materials

-
1. [First Meeting](#)
 2. [Timeline](#)
 3. [Summit Work](#)
 4. [Summit Evaluation](#)
 5. [Logistics Sub-Committee](#)
 6. [Communications Sub-Committee](#)
 7. [Information Gathering Sub-Committee](#)
 8. [Core Sub-Committee](#)
 9. [Checklists](#)
-

1. First Meeting

Before the first meeting, a core group of leaders select 8-12 employees from all levels and functional areas to be on the Summit Planning Committee.

Initial Meeting between Facilitators and new Summit Planning Committee:

- One-On-One Interviews answering the question:
 - I will be most proud of GMCR in (10 years from now) if...
 - In terms of Business
 - In terms of human spirit and culture
 - In terms of benefit to the world
- Report responses/results back to entire group
- Use these results to start creating the topic for the Summit
- Talk about Appreciative Inquiry and the 4-D Cycle (Discovery, Dream, Design, and Destiny)
- Define what the task or strategic focus was from the interviews. This will lead to the refinement of the main topic and sub-bullets. If existing Summit Initiatives exist, look to these team or resources to help determine appropriate topics.
- Discuss the stages that occur at the Summit
- Discuss who the stakeholders are for the Summit
- Define roles clearly on the first day.
 - Who is our sponsor for the Summit Planning Group?
 - What are the sub-committees? (Logistics, Information Gathering, Communication, and Core Team)
 - Who is on the sub-committees?
- Set up the first meeting for the sub-committees to meet

1. Timeline

Also see Summit Planning Table for to see activities and team role responsibilities

12-Week Planning Schedule or Activities to Think about:

Week 12

- 1st Meeting
- Topic Finalized
- Sub-Committee Defined

Week 11

- Sub-Committees meet
- Research Summit location
- Determine approximate number of attendees

Week 10

- Communication to Departments about identifying stakeholders
- Compile list of External invitees
- Decide on location and Reserve it for the dates of the Summit
- Compile list of Internal invitees
- Draft agenda

Week 9

- Draft questions or Interview Guide
- Share draft questions with Consultants
- Invitations to external stakeholders sent out with the agenda
- Decide on location of Celebratory event

Week 8

- Draft Workbook
- Finalize list of External participants reviewed by Senior Leaders

Week 7

- List of Internal Invitees reviewed by Senior Leaders

Week 6

- Arrange to have someone videotape the Summit
- Reserve location of Celebratory event
- Invitations to internal invitees sent out

Week 5

- Workbook draft sent to Consultants – Ask for feedback within a specific time
- Draft Post-Summit Process

Week 4

- Follow-up phone calls made to external invitees
- RSVP Date on the invitations is during this week
- Week with some Pre-Summit Event

Week 3

- Final day to accept external invitees due to airline prices
- Send completed workbook to printer
- Meet with Payroll Coordinator to determine procedures
- Communicate to employees about what mileage they can get reimbursed for

Week 2

- Pre-Summit Meeting for those new to company
- Share information on Design Principles with Company
- Post new topic for Summit

Week 1

- Summit

[Return to Top of Document](#) (Triple Click)

3. Summit Work

During the Summit, several pieces of work may be created. It is important to have an understanding before the Summit of what work will be coming out of the Summit and to have a follow-up plan for each piece of work.

A variety of material can be created during a Summit. Examples of this material can include:

- *Provocative Propositions.* These are typically aspiration statements about beliefs, values, or ideas on future ways of being.
 - Tip: To capture these propositions ask people to enter the Provocative Propositions onto pre-set Power Point Slides. The audience will appreciate being able to read the words as they are being presented. Having the materials on Power Point following the Summit will also allow you to present the material easily on the Intranet, in other meetings, or transfer into Microsoft Word for documentation purposes.
- *Metaphors.* These can be pictures or words that describe a concept in different, new or creative way. This material may come out of an activity during the dream phase of Appreciative Inquiry.
 - Tip: To capture the material in a quick way it might be useful to have a digital camera to take pictures of the words, pictures, and ideas expressed on flip charts. These pictures can be easily accessed at a later date without having to recreate the graphic material.
- *Theme timelines.* These are large posters where people write down events or ideas that were important in relation to a theme. This is a great way for functional areas, groups, or individuals to see a collective story of how something occurred.
 - Tip: To capture this material it is helpful for
- *Graphic Recordings.* Sometimes a graphic recorder comes to a Summit to capture the conversations taking place each day. Attendees can visually see the progress taking place each day. A good graphic recorder can capture themes through pictures, diagrams, and phrases.
 - Tip: These are amazing pieces of work and needs to be treated with care. The large paper needs to be taken off the walls carefully and put into chronological order. The graphic recorder or their associate can then work to create a booklet with the graphic recordings. This book can be distributed to participants to help remind them what took place at the Summit.
- *Action Plans or Pilot Project.* These are short or long-term projects that people propose and the organization decides to support. The work of these projects is started on the last day of the Summit and timelines for follow-up are scheduled before people leave the event.
 - Tip: Capture information on the computer before the event ends. People will want to know who is involved on the pilot project team, immediate next steps, goals for the project, and expected outcomes. A summary of this material should also be distributed in some format to the whole organization to help communication what happened at the Summit.

4. Example of a Summit Evaluation Form:

Please circle the number that best represents your views for each item. Your opinion is important. Please hand in your survey before leaving the Summit or return to Sarah Patterson in HR (x1321).

	Excellent	Very Good	Good	Fair	Poor
Overall:					
Overall Reaction to the Summit	5	4	3	2	1
Rate the Following Components:					
The Steering Committee and Summit Teamwork	5	4	3	2	1
The Large Group Appreciative Inquiry Summit Method	5	4	3	2	1
Facilitation and Education	5	4	3	2	1
GMCR Management in relation to the Summit	5	4	3	2	1
External Stakeholder Involvement	5	4	3	2	1
Your Involvement	5	4	3	2	1
The Facilities	5	4	3	2	1
Meals	5	4	3	2	1
To what extent have these sources provided meaningful learning?					
Speakers	5	4	3	2	1
GMCR Management	5	4	3	2	1
Peer Group	5	4	3	2	1
Self Reflection	5	4	3	2	1

What do you think about the Summit Topic and Sub-topics?

Are we moving in the right direction to meet the needs of these topics?

In your opinion, what was the most engaging activity at the summit?

[Return to Top of Document](#) (Triple Click)

Based on your experiences at this Summit, what is the most important outcome for you and for the company?

Please describe your overall Growth Summit experience.

What are the most meaningful insights or lessons from this program or summit?

What should be considered to improve the next large group summit?

5. Logistics Sub-Committee:

Objective: To organize the logistical details of the Summit and manage the Summit logistics at the actual event. This committee is responsible for sending out the invitations, handling participants' arrangements, organizing a social event, and organizing the logistical details needed to pull off a three day event.

Potential Action Steps:

- Gather names of stakeholders to be invited to the Summit
- Send the invitations with directions to the location and a draft agenda to all potential participants
- Establish the logistical plan once receive the agenda from the Core Team
- Reserve the space and AV equipment for the actual Summit event
- Communicate regularly with Vendors for this event and changed plans based on communication from the larger committee
- Arrange to have laptops, a digital camera, a portable printer, and office supplies at the Summit
- Bring in a person to do the graphic recording and another individual to video the event
- Organize materials to place on the wall at the Summit
- Coordinate the travel and lodging plans for all the external participants
- Plan a celebratory event and all the menus for the Summit attendees
- Organize the printing of name tags with Administrative Services once the participant list is complete
- Send the final participant list to all the sub-group and support the Communication Team in creating a participant list for the workbook
- Use GMCR Guidelines for menu planning
- Confirm with remote participants that they have their flight arrangements and confirmation numbers
- Place all the stakeholders at appropriate tables (Table Charts) and create table tents
- Order all supplies and logo-apparel:
 - Tee-shirts for everyone (logo)
 - Polo-shirts for Committee Members (logo)
 - Portfolios (logo)
 - Canvas bags (logo)
 - Paper for Invitations
 - World, stress balls
 - Pens
 - Colored dots
 - Colored Index Cards
 - Flip Charts
 - Markers

[Return to Top of Document](#) (Triple Click)

- Poster Board for Wall
- Nametag holders

- Candy
- Skit box with props

Action Steps at the actual Summit:

- Have a timekeeper for the facilitators and larger room.
- Have extra copies of the materials. Plan on making copies of materials during the event.
- Set-up a bigger riser so that more people can see the speakers. This could be a stage.
- An AV person should be ready to assist with technological failures.
- Be aware of any activities where materials need to be collected for the facilitators. Plan accordingly.
- Ask the person videotaping the presenters to also capture a individual stories from participants.
- Ask the facilitators to give clear instructions on the process of each activity and what the expected outcome will look like.
- Label the flip charts or set up documents on computers to capture the Summit work.

6. Communication Sub-Committee:

Objective: To educate and build energy for the Growth Summit. This committee has the goal of communicating to everyone in the company about the Summit and responsibility to organize Pre-Summit Meetings or educational events.

Action Steps:

- Draft voicemail and e-mail from Senior Leader to introduce the Summit
- Create the invitations and related materials to be sent out by the Logistics Team
- Create posters to hang around the company – Waterbury and Regional Operation Centers
- Place information about the Summit on the Intranet
- Create information bulletin about past and present Summit activities
- Print the Workbook once receive details from the Core Team
- Create a participant list to include in the workbook binder
- Organize an educational event about Appreciative Inquiry
- Create presentation for company meetings to share Summit happenings

7. Information Gathering Sub-Committee:

Objective: To gather materials to support the theme and goals of the specific Summit. This committee is responsible for gathering articles, finding resources that align with the theme, suggesting speakers, and outlining presentation materials to the larger group.

Action Steps:

- Research resources and articles
- Make suggestions to the team about potential speakers
- Connect on a regular basis with the Core Team about the Summit agenda

8. Core Team Sub-Committee:

Objective: To outline the activities of the summit, draft the AI questions, and create the workbook. This small sub-committee, made up of both employees, leaders and the facilitators, is responsible for the content and flow of the Summit.

Action Steps:

- Outline the objects of the Summit
- Draft the agenda and details about each activity. The logistics committee needs the detail to established the logistical details
- Draft the interview guide or questions
- Draft the workbook
- After drafting the materials, ask the proofing team to review the workbook, the agenda, and the invitation
- Regularly communicate happenings with the other sub-groups
- Plan the post-summit process and expected outcomes

9. Checklists

Item	Contact	Date Started	Date Completed	Notes
<i>Pre-Summit</i>				
Location Reserved				
Main conference room to hold 100-150 people				
Room large enough for # of tables required to seat no more than 8 per table				
Adequate Breakout space for teamwork				Need Breakout space to cope with noise
Access to space afternoon before meeting				12:00pm – Access day before meeting
Participant List				
Invitations				
Interview Questions				
Agenda				
Workbook				
Hotel Reservations				
Airline Reservations				As Needed
Table Assignments				
Table assignment for cross-functional groups				
Table assignment for functional groups				
Table Tents				Each table should have a number
Name Tags				
Menu Plan				Breaks, Breakfast, Lunch, Some Dinners following GMCR's food plan

[Return to Top of Document](#) (Triple Click)

<i>Summit</i>				
Reservation Table				
Food Set-Up				Following GMCR's food plan
Coffee Set-Up/ Continental Breakfast				In room 30 minutes prior to meeting
Food for Breaks				Drinks and 1 snack per break, like fruit
AV Equipment				
Sound system equipment				
2 Lavaliers and 3 portable, hand-held cordless microphones				Need to be able to use all day
Sound system tested				On-site technician (not participating in Summit) available
1 DVD/Video Player & 2 LCD Projector				
Projector, PowerPoint, and Video tested				
2 Big Projector Screens				
Laptops for each participant table				
All Summit Worksheets on Participant Laptops				
Laptop with Printer set up in adjacent room				Need for logistics
Extra laptop for front of room				
Access to copier				
2 USB Ports/Drivers to transfer data				
Participant list in excel file				

Additional Hand-out laid out from SR organizations				
Flip charts and markers				
Colored dots fro voting				
Posters and Company logos				
Visual poster to support theme				
Foam core board				
Duct tape (clear)				
T-shirts				
Skit supplies & props				