

## (Convening Name) Project Management Plan

*Note: This is a high-level planning template meant to help you visualize and understand the various components of planning a generic strategic convening. We expect that you will calibrate and customize this framework for your specific needs.*

**Convening Purpose:**

**Design Approach:**

**Convening Date:**

**Convening Location:**

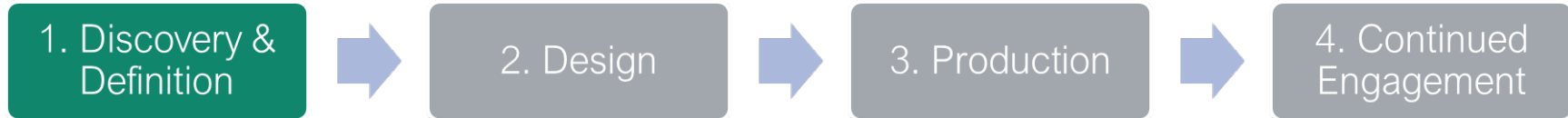
### Part 1. Roles and Responsibilities

Roles	Assigned
<b>Sponsor:</b> Calls for the convening, defines its purpose, sets the overall vision and outline of the design and oversees the process at a high level; oversees budgets and contracts.	
<b>Executive Producer:</b> Coordination and alignment between design team and client; Attends initial planning and design meetings and jumps in to help course correct.	
<b>Content Lead:</b> Sets vision and goal, convening strategy in consultation with design team; Determines speakers and facilitators; Engages with the design team to develop design, agenda, and run of show; Determines participant mix, speakers, and facilitator.	
<b>Project &amp; Communications Manager:</b> <i>Note for Bellagio convenings, some of these roles may be handled by the convening production partner as determined by their scope of work, especially "Communications &amp; Outreach."</i>	
<b>Project Management:</b> Creates and manages project plan; Sends regular status updates with suggested next steps and action items; Schedules meetings with consultants; Develops run of show / moderator agenda and manages changes. The project manager may also play the following roles if not assigned to someone else:	

<p><b>Communications &amp; Outreach:</b> Develops and manages invitation list; Sends invitations and manages RSVPs; Sends post-convening survey; Invites speakers and manages their experience throughout.</p> <p><b>Messaging &amp; Materials Management:</b> Works with the Content Lead to ensure that all materials are accurate, professional and complete. This may mean interfacing with speakers and facilitators to secure material from them in the proper format in a timely fashion; Ensures assets like bios, agenda, and pre-read are in order for distribution to attendees; Manages note takers and plans for post convening report outs.</p>	
<p><b>Project Assistant:</b> Works with the Project Manager and the Content Lead to manage the materials, communications and outreach as needed for partners, speakers and participants (may be handled by Project Manager).</p>	
<p><b>Design Lead:</b> Determines tactics and agenda flow based on selected convening purpose and content; Prepares moderator agenda.</p>	
<p><b>Facilitator / MC:</b> The main forward facing personality during the convening itself; Needs to understand the content and design and engage the participants fully. Needs to act quickly on their feet to keep the program moving in harmony with the purpose.</p>	
<p><b>Technology or AudioVisual Manager:</b> Manages the technology to make the convening happen, either via a technology platform if done virtually or via presentations or other means if in-person.</p>	
<p><b>Note taker(s):</b> The note takers are familiar with the subject area and meticulous in capturing complex ideas accurately in real time; They attend the convening and capture the substance of what happens to inform post-convening communications and reports.</p>	
<p><b>Day Of Decision Maker (Typically Sponsor or Content Lead):</b> On call to manage day of needs; revise agenda and adjust as needed.</p>	

**Part 2. Project Management Plan**

Phase I



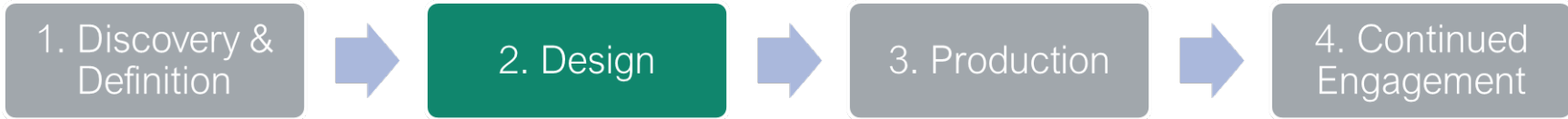
**Roles Needed:** Sponsor, Executive Producer, Project Manager, Content Lead, Content Assist, Design Lead

Define Convening Purpose & Strategy			
In-person: 6-9 months out		Virtual: 3-4 months out	
Task	Lead	Status	Due Date
Confirm purpose of convening with key leadership			
Align on high-level strategy for the convening			
Agree on core project team & roles			
Set kick off meeting, including with convening production partner			
Schedule daily / weekly check-in cadence, including content and planning check-ins as needed			
Develop communication plans – Internal comms / Speaker comms / Attendee comms			
Identify pre-convening content: What are the papers / documents that need to be developed and shared, to whom?			
Determine the date <ul style="list-style-type: none"> <li>If in-person: Determine location and agree on logistics provider / leads</li> </ul>			

<ul style="list-style-type: none"> <li>If virtual: Determine technology platform for convening (Cvent / Zoom)</li> </ul>			
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Set Initial Participant List and Send Save the Dates			
In-person: 5 - 8 months out		Virtual: 2-3 months out	
Task	Lead	Status	Due Date
Identify participants to achieve your purpose; Start drafting the invitation list (A list and B list) and segment participants according to roles you need to achieve your purpose. Consider diversity of perspectives, including traditionally underrepresented voices that could add to the discussion			
Develop and send save the dates			
Send out invitations			
Track RSVPs and send out reminders as needed up until day-of; roll out new invitations based on RSVPs			
For in-person: send travel information to confirmed participants			

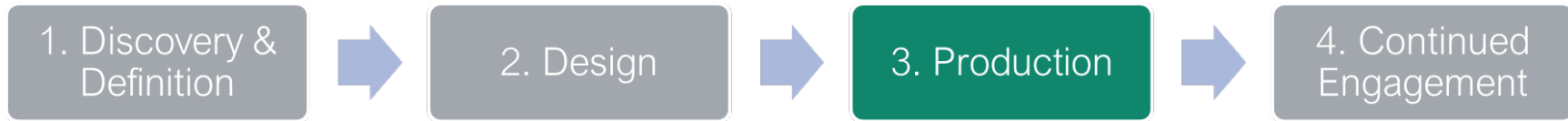
Phase II



**Roles Needed:** Executive Producer, Project Manager, Content Lead, Content Assist, Design Lead

Clarify Strategy, Design, Agenda, Run of Show and Logistics			
In-person: 3-4 months out		Virtual: 3-4 months out	
Task	Lead	Status	Due Date
Refine and clarify purpose of convening with key leadership			
Develop design options that achieve purpose and align to convening strategy			
Finalize and agree on design that best achieves purpose and aligns to convening strategy			
Identify and invite facilitator(s)			
Develop branding and specs for on-site materials; assign roles to produce materials			
Develop internal detailed run of show / moderator agenda; include session prompts and facilitator guide / agenda; materials needed; breaks; meals; beginning and end of day check-ins etc.			
Develop participant facing agenda			

Phase III



**Roles Needed:** Executive Producer, Project Manager, Content Lead, Content Assist, Day of Roles (Technology / AV Manager, Breakout Leader, Facilitator / MC, Notetaker)

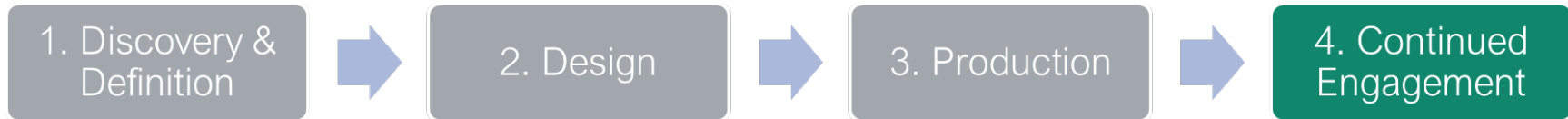
Invite Speakers and Prepare Key Team Members			
In-person: 6 weeks out		Virtual: 6 weeks out	
Task	Lead	Status	Due Date
Determine speakers and session leads			
Recruit speakers and session leads			
Prep speakers and session leads including suggested talking points, request for bios; schedule prep calls as needed (1:1 or as group)			
Prep speakers, session leads, and facilitators on convening purpose, design, agenda, participants, etc.			

Send Materials and Rehearse			
In-person: 2 weeks out		Virtual: 2 weeks out	
Task	Lead	Status	Due Date
Develop and send a final package of materials including participant facing agenda, bios, pre-read, contact information etc.; final confirmation of all recruited speakers and confirmed attendees			

Schedule rehearsal with the convening project team			
Schedule rehearsal with the logistics provider and facilitator, including assigning roles for day of, reviewing all slides and videos, and running through scenarios for tech and content disruptions <ul style="list-style-type: none"> <li>For virtual: using chat, sharing screen, testing platform link, managing breakouts</li> </ul>			
Prepare day of roles and responsibilities (see below)			
Prepare scenarios to troubleshoot			
Brief key stakeholders on final details			

<b>Finalize Run of Show and Send Reminders</b>			
<b>In-person: 1-2 days pre-convening</b>		<b>Virtual: 1-2 days pre-convening</b>	
<b>Task</b>	<b>Lead</b>	<b>Status</b>	<b>Due Date</b>
Schedule pre-convening prep meeting with core team, sponsor, facilitator, logistics provider, etc.			
Send out reminder on location and logistics, including full program agenda, participant list and pre-reads, and contact number / email for participants who may need assistance <ul style="list-style-type: none"> <li>If virtual: Share platform access link</li> </ul>			
Schedule beginning and end of day huddles for core team			

Phase IV



**Roles Needed:** Sponsor, Executive Producer, Project Manager, Content Lead

Thank Participants and Facilitate Next Steps			
In-person: 1-2 days post-convening		Virtual: 1-2 days post-convening	
Task	Lead	Status	Due Date
Draft and send thank you notes			
Distribute survey link			
Complete Bellagio two-page post-convening summary			
Facilitate agreement on next steps to be shared with participants			
Schedule a follow up, ideally in a post Bellagio meeting ~1 month out			