

# Planning an ESC Workshop on Energy Performance Contracting CHECKLIST

Who?

What?

Where?

When?

How?



State Chapters of the Energy Services Coalition can put on very successful workshops to educate about energy performance contracting. Below is a checklist of things to consider, which is useful for a simple, no-frills workshop or a very formal conference.

**Who?**

✓ **Planning Committee**

- Count on your ESC State Chapter to be a major force in planning and implementing a successful workshop. If a chapter does not exist in your state, talk to the ESC about starting one.
- Minimum of 3 people (important to have a high-ranking representative from the state energy office as well as private sector representatives; identify chairperson with lead responsibility)
- Solicit meeting planner/coordinator (negotiate performance basis payment)
- Establish committees to handle different segments (logistics/budget, speakers/vendor interface, brochure and event promotion)
- Enlist ESC-national support (state technical support liaisons, website/webmaster, treasurer, registration system, fee collection system, sample slideshows, sample agendas, guidance, sample handouts, etc.) See the website for continued information.

***Keeping it Simple***

- *Decide on a no-frills, no-cost workshop; have a 2-hour initial planning meeting; hold intermittent conference calls to ensure key details are handled*
- *ESC Resources – Use this checklist; Confer with ESC-national to get added support from state technical liaisons and the ESC website with its webmaster.*

✓ **Target audience**

Preliminary Planning

- Market Sector (Government institutions, commercial/industrial; Specific market sector such as schools, state departments, hospitals, multifamily housing, universities, etc.; or a combined audience; note that any introductory/motivational workshop may be appropriate for a mixed audience and could reach a large number of people in a single event)

- Individuals within Market Sectors: project managers, decision-makers (city manager, school district superintendent, etc.), financial officers, engineering/facilities staff, etc.
- Is theme appropriate for the market sector and the individuals targeted?

#### Implementation

- Identify organizations to contact
- Contact organizations to get e-mail lists, get commitment to send out announcements, and get commitment to place announcement in newsletters

#### ***Keeping it Simple***

- *Identify a single target sector and get commitment from the most influential organization related to this target sector to attract attendees (e.g. to attract state agencies and higher education institutions, get commitment from the state's "GSA-type" agency)*

### ✓ **Trade show vendors (table-top exhibitors)**

#### Preliminary Planning

- Pros:
  - A potential money maker
  - A way to get others involved
- Cons:
  - Time and effort to solicit vendors and make arrangements
  - Venue needs - more space
  - Is this a distraction to your message or a plus?
- Identify types of organizations/companies (energy office, ESCOs, DOE/EPA or other federal entities, vendors; consider whether vendors support the performance contracting model or compete with it)
- Determine exhibitor fees versus benefits (See Sponsorship Solicitation Letter); Consider exhibitor fees for the private sector of \$250-\$400 with recognition benefits; consider lower cost or free booths for government or non-profit organizations.

#### Implementation

- Announce trade show opportunity
- Confirm participants
- Provide information on set-up (time to arrive, electricity availability, rules on advertising, etc.; table-tops rather than booths are typical)
- Offer opportunity on agenda for trade show participants to give a 2-minute introduction of their product/service (prior to break)

#### ***Keeping it Simple***

- *Eliminate this category, as it is a substantial effort to interface with this group and handle revenues. Or, allow vendors to participate at no cost. Or, allow vendors to provide literature only on a shared table.*

### ✓ **Funding Sponsors (Contributions in exchange for Recognition or Participation)**

#### Preliminary Planning

- Identify organizations/companies to solicit
- Send letter to request sponsorship
- Confirm sponsorships and role of sponsors
- Arrange for donations to be sent to ESC treasurer
- Get sponsor logo
- Include sponsor recognition on announcement with logo
- Get sponsor bio
- Thank sponsors, share final comments and attendee count/make-up

#### ***Keeping it Simple***

- *Eliminate this category, as it is a substantial effort to solicit contributions, handle revenue, interface with sponsors and ensure proper recognition.*

- *ESC Resources: Sponsor solicitation letter with suggested fee categories and associated benefits. ESC Treasurer to handle financial transactions. ESC web-based registration system for sponsors.*

✓ **Supporting Sponsors (Lending their name/logo and helping to advertise)**

Preliminary Planning

- Identify organizations to solicit (organizations that target audience members belong to, and organizations with similar goals)
- Request - supporting sponsors can advertise to their members, lend their logo, and participate in other ways without providing funds
- Send letter to request sponsorship
- Confirm sponsorships and role of sponsors, offering a free attendee spot and recognition
- Get event on their calendar or in their newsletters
- Get sponsor logo
- Include sponsor recognition on announcement with logo
- Get sponsor bio
- Register free attendees
- Thank sponsors, share final comments and attendee count/make-up

***Keeping it Simple***

- *As mentioned above, this can be the key to holding a successful workshop with little effort. Identify a single target sector and attract the key supporting sponsor who can communicate with these attendees (e.g. to attract state agencies and higher education institutions, get commitment from the state's "GSA-type" agency)*

✓ **Speakers**

Preliminary Planning

- Identify possible moderators and presenters (ESC chapter members and local experts, EPA/DOE or national laboratory speakers), keynote speakers (paid speakers?), emcee (ESC co-chairs), welcome (site host), project managers from successful projects to present case studies, etc.

Implementation

- Select Moderators
- Select Speakers
  - Work with session moderators to identify speakers for their sessions
  - Develop fairness protocol for selecting speakers from ESC membership
  - Contact speakers and confirm participation
  - Contact panel moderators and confirm participation
- Confirm speakers for topic and time-slot
- Prepare speakers
  - Discuss theme/topic and length of presentation, and fellow panelists and moderator
  - Send presenter guidelines
  - Send presentation guidelines
  - Contact speakers for advance copy of slideshow
  - Review and approve slideshow
  - Confirm compliance with requirements and appropriateness/length of slideshow
  - Get slideshows
  - Confirm audio/visual needs
  - Get bios

***Keeping it Simple***

- *Look to ESC members, the state energy office, and friends of the group to volunteer to speak to minimize interface and budget needs. Divide the responsibility – assign moderators to each session who will identify and prepare speakers for their sessions. Use ESC's resources: slideshow templates, sample slideshows.*

## What?

### ✓ Goals

#### Preliminary Planning

- Establish the desired outcome for the identified target audience
- Spend some time making this determination, then go through a preliminary planning process and return to this goal-setting task

### ✓ Theme and Title

#### Preliminary Planning

- Consider making the theme broad to attract a variety of attendees (Greening Your Facilities through Performance Contracting, including presentations on renewables, LEED and greening strategies). Or, consider making the theme very specific to attract a very targeted audience (Performance Contracting Boot Camp, for those project managers soon to oversee projects).
- Spend some time coming up with a title that will attract interest from your desired audience.

### ✓ Length of workshop

#### Preliminary Planning

- Instead of a half-day, consider a full-day workshop to justify attendee fees and trade show booths that can provide income to offset workshop costs; the 8:30 to 3:30 timeframe works well for most attendees avoid making it a longer day
- Even consider a 1-1/2 to 2-day conference
- Apply perspective first of how much time is needed to provide value for attendees and vendors for price to attend.
- Consider impact on budget for cost of facility, meals, etc. and impact on attendees for hotels and days away from work
- Consider added pressure on committee to “fill” time the longer the program goes (additional speakers/activities)

#### ***Keeping it Simple***

- *A half-day workshop can avoid the cost and planning of meals and may very well meet your goals. However, a full-day (8:30 – 3:00) workshop can be just as easy with food/coffee contributions and same-room dining.*

### ✓ Type of workshop (budget):

#### Preliminary Planning

- Simple, no-frills, easy planning, no/low-cost workshop or
- Consider need and organizational capacity for a large-scale, high-profile, somewhat formal, revenue generating workshop/seminar/conference.

#### ***Keeping it Simple***

- *Plan a no-budget, all volunteer, no attendee fees workshop. Or charge attendees only for the lunch and get an advance RSVP (Note: a fee equates to a commitment to attend so this is worth the trouble).*

### ✓ Agenda

#### Preliminary Planning

- Define panel topics
- Very rough outline of possible agenda and speakers (draw from the ESC membership and the state energy office for un-paid speakers and moderators)

#### Implementation

- Agenda draft – high-level to determine message/title, audience, and start/end time
- Agenda – final

#### ***Keeping it Simple***

- *Get volunteers as moderators and have them participate in agenda planning.*

- *ESC Resources: Sample agendas.*
- ✓ **Announcement/Advertisement**
  - Implementation
    - Draft Announcement/advertisement (include title, who should attend, goals/description, location, date, length, site host sponsor, etc.)
    - Final Announcement
  - Keeping it Simple***
    - *ESC Resources: Announcement template.*
- ✓ **Slideshows**
  - Implementation
    - Provide template to speakers
    - Collect presentations
    - Review presentations (no company advertising, adherence to ESC presentation guidelines)
    - Identify person to load/manage slideshows on day of workshop
    - Upload presentations to CD and to the main presentation computer
    - Manage slideshows on day of workshop
    - Post slideshows on workshop website for downloading (convert slideshows to pdf or other format to reduce size, and keep each presentation separate to enable easy downloads)
  - Keeping it Simple***
    - *Moderators work with presenters; presenters commit to using guidelines so that no review is required; each presenter brings their slideshow the morning of the event or during a break.*
    - *ESC Resources: Presentation guidelines; Model slide templates; Sample slideshows*
- ✓ **Sponsor Recognition Slideshow (Looping before event and during breaks)**
  - Implementation
    - Develop slides with sponsor logos (*ESC Resources – sample slideshow*)
    - Develop interim “did you know?” fact slides to capture interest (energy facts – national and regional; get members to participate in developing these)
  - Keeping it Simple***
    - *Eliminate sponsors and associated interface efforts*
    - *ESC Resources: Template slideshow.*
- ✓ **Handouts**
  - Preliminary Planning
    - Identify needed handouts
    - Consider cost – printed or web-based (be “green” and keep paper to a minimum; sponsor list; agenda; bios; ESC and performance contracting overview; evaluation form)
  - Implementation
    - Assemble materials (attendee list, agenda, speaker bios, presentations; link to find downloadable presentations, sponsor bios, thank you to sponsors and site host, evaluation form, etc.)
    - Print materials as needed (double-sided)
    - Purchase binders (eco-friendly), carrying bags or other promotional materials
    - Obtain gifts/favors/prizes through donations or purchase (compact fluorescent lamps or other eco-products)
    - Assemble notebooks
  - Keeping it Simple***
    - *Go “green” and avoid . Provide all info on-line and only provide attendees with a half-page handout on link and description of presentations on-line, plus perhaps an evaluation form.*
    - *ESC Resources: Downloadable handouts; ESC website for posting workshop information.*
- ✓ **Certificates of Attendance**
  - Implementation
    - Download list of attendees

- Design certificate
- Print certificates and print added certificates with blank for attendee names for any late-registered attendees
- Distribute on day of workshop (during registration, to avoid later mailing)

***Keeping it Simple***

- *Use ESC template certificate, print out batch with line to hand-print names, distribute at registration. Although this could be eliminated, attendees find it valuable to document their job training.*
- *ESC Resources: Template certificate*

✓ **Evaluation**

Implementation

- Develop evaluation form
- Distribute on day of event or by e-mail the day after the event (recommended as “green” and to have information electronically; consider using an on-line evaluation service for anonymous and automatically compiled results)

***Keeping it Simple***

- *Print out forms generic template forms and distribute; or e-mail a follow-up evaluation.*
- *ESC Resources: Sample evaluation form.*

✓ **Signage**

- Develop signs to recognize sponsors
- Develop other signage (directions to event and to other rooms; registration signs – A-L; M-Z)

***Keeping it Simple***

- *No signs needed, except perhaps one to direct people to the meeting room*

**How?**

✓ **Planning Committee**

- Meet frequently (every 2-3 weeks early-on and then weekly beginning 6 weeks prior to the workshop)
- Establish time-line with critical step(s) and milestone completion dates

***Keeping it Simple***

- *Divide tasks and establish clear responsibilities for each volunteer on planning committee. Hold one face-to-face preliminary planning meeting and then “meet” by conference call as needed, with e-mail correspondence to document progress on those responsibilities.*

✓ **Budget Needs**

- Expected costs
  - Meals, including refreshments mid-morning and mid-afternoon
  - Facilities
  - Printing
  - Nametags
  - A/V equipment and support services
  - Speakers
  - Brochure development
  - Brochure printing
  - Handouts, including evaluation sheet
  - Signage to recognize sponsors
- Offsetting Costs
  - Free facility
  - No-cost speakers
  - ESC members or site host provide a/v equipment

- No printing (E-mail announcements and make materials available on-line; or speakers provide their own handouts; consider green no-handout policy)
  - Site host provides coffee
  - Attendee fees (government rate, private rate, late-registration rate)
  - Booth fees (vendors, government/non-profit)
  - Sponsor donations for meals and refreshments
  - Seek grants and/or in-kind commitments for specific cost items
- Cash flow issues (if revenue lags payment requirements)
- Keeping it Simple***
- *Avoid costs altogether through voluntary donations of food and facilities, and with e-mail and web-based information sharing.*
- ✓ **Website Posting**
  - Set-up a workshop web page on the ESC chapter website ([www.energyservicescoalition.org](http://www.energyservicescoalition.org) – your state chapter site).
  - Post announcement
  - Post agenda - draft
  - Post agenda – final
  - Post bios
  - Post sponsorship solicitation
  - Post map link for location
  - Post hotel recommendations
  - Post slideshows (after workshop)
- Keeping it Simple***
- *This task helps to keep things simple – post all workshop related information on the workshop website*
- *ESC Resources – Use ESC chapter website and webmaster support*
- ✓ **Registration System**
  - Identify an on-line registration system (handles checks, credit cards, invoicing, registration confirmation, database of attendee contact information, attendee list for check-in and nametags, etc.)
  - Set-up registration system (attendee cost, link to workshop website page for continually updated information)
  - Include registration link in announcement
  - Check status of registrants
- Keeping it Simple***
- *Volunteer to handle phone-in or email RSVPs (an ESC member can volunteer the company receptionist)*
- *ESC Resources – Use ESC’s on-line registration system with webmaster support – ask for tips to using this effectively.*
- ✓ **Advertising**
  - Start announcing the workshop early, even before plans are settled – announce at similar types of events
  - Create announcement (See ESC workshop announcement template)
  - Send out announcement in e-mail notice, with a link to the website for continued workshop updates
  - Send pre-workshop reminder and link to website to find details on agenda, bios, sponsors, etc.
  - Send preliminary announcement (Save the Date) to ESC chapter membership and potential attendees
  - Develop e-mail announcement
  - Get approval from sponsors and others

- Develop an e-mail and print-ready announcement
- Send final announcement to e-mail lists
- Send electronic announcement to organizations to distribute to their memberships and to post in their newsletters
- Send electronic announcements to ESC members to distribute to their clients and associates
- Print and mail announcements to organizations who can physically distribute flyers, to key individuals who may not respond to an e-mail announcement, and to organizations that can insert flyers into their regular mailings. Request ESC members to do printing to spread the costs.
- Follow-up with personal phone calls – contact organizations to make sure they posted or forwarded the announcement as promised

***Keeping it Simple***

- *As mentioned above, rely on a single, influential supporting partner to get attendees.*
- *ESC Resources – Electronic/print-ready announcement template.*

✓ **Food/drink**

- Contact caterer
- Arrange for all-day coffee and water, arrival breakfast foods, morning break, lunch, afternoon break (consider brunch as lower-cost and “greener” alternative to box lunches; order for fewer attendees to reduce left-overs)
- Apply green principles (buffet instead of boxed lunches; juices in glass flasks instead of individual plastic bottles; hot water in large container with teabags; coffee in large heated container; re-usable table service instead of plastic; napkins instead of small plates for cookies; etc.)
- Evaluate budget
- Determine who pays for what
- Arrange for payment (can sponsor will pay directly?)
- Identify contact person for caterer to find on day of event
- Finalize arrangements

***Keeping it Simple***

- *Get site host to provide coffee throughout the day. Get contribution/volunteer to provide and deliver lunches.*

✓ **Audio/Visual Needs**

- LCD Projector
- Computer for projector and back-up
- LCD projector
- Screen
- Podium
- Microphone
  - for speaker
  - for multiple panelists
  - for audience questions
- Looping slideshow for pre-workshop or lunch periods
- Extension cords
- Computer cable
- Power strip
- Identify what site host or ESC members can provide
- Whiteboards with markers
- Flip charts with easels

***Keeping it Simple***

- *ESC members bring computer, LCD projector and other items, while site host provides the basics.*



- ✓ **Nametags**
  - Monitor registration on-line
  - Download list of attendees
  - Print nametags (print name large so people can see from a distance; include ESC logo)
- Keeping it Simple*
  - *Just bring blank stick-on labels and markers – ask an ESC member to provide.*
- ✓ **Final Arrangements**
  - Attendee count to site host
  - Confirm tasks of committees/volunteers
  - Confirm catering arrangements
  - Confirm room lay-out
  - Pack materials
    - Nametags (alphabetical order)
    - Handouts
    - Certificates (alphabetical order)
    - Attendee list for check-in (with payment confirmation)
    - Receipt book (if accepting same-day payment)
- ✓ **Day of Event**
  - Arrange nametags
  - Arrange handouts
  - Have check-in list for attendees
  - Arrange certificates
- ✓ **After the event**
  - E-mail evaluation checklist/comment form to attendees, with reminder of where to download slideshows, thank you for participating and thank you to sponsors
  - Finalize costs and fee intake
  - Authorize final payments
  - Report revenue , costs and net revenue to ESC planning committee
  - Send thank you letters to sponsors, speakers, moderators, hosts

## When?

- ✓ **Setting the date**
  - Allow MORE than 2 months (4-6 months is ideal) from the onset of planning - consider the amount of time to plan the workshop, settle all details, and give potential attendees AT MINIMUM a six-week notice
  - Identify preferred dates, allowing for sufficient advance time, when the planning committee and other leaders can attend, when potential key speakers, moderators, or helpers can attend, and when there are no competing conferences or events.
  - Finalize date

## Where?

- ✓ **City/Region**
  - Preliminary Planning
    - Select desired city or region based on message and desired outcome and accessibility (major highways, airport, parking)
  - Implementation
    - Determine specific location and host (utilities and governments typically have no-cost facilities; utilities typically provide the added benefits of marketing to their customers and providing coffee/food)
- ✓ **Facility**
  - Meet your needs

- Easy access (major highway, landmarks, airport)
- Free or easy parking
- Room for expected number of attendees
- Room layout
- Break-out meeting room needs
- Display table area
- Registration area
- Local lodging accommodations
- Local dining accommodations (arrange for discounts), shipping/receiving and set-up
- Food service or dining capability
- A/v needs or services
- Operation hours consistent with workshop times
- RECOMMEND not using a facility where ESPC has been implemented – use neutral ground !
- Budget impacts
  - Deposit/payment requirements
  - AV equipment and support services
  - Food service (required to use facility’s food service or delivery allowed?)

***Keeping it Simple***

- *Select a site host that offers a lot of assistance to help you put on a successful workshop (utilities, state energy offices, state departments and others have staff to do just that)*

✓ **Site plans**

- Room layout for attendees (classroom style is typically best - includes tables for attendees; theater style does not have tables for attendees but allows for more participants; other arrangements allow for participant interaction; options for break-out activities)
- Added tables
  - Table for handouts and certificates at entrance
  - Table for greeter and registration checker at entrance
  - Table for nametags (spread out in alphabetical order)
  - Table in back of room for added handouts
  - Tables for exhibitors
  - Table for panelists at front of room
  - Table for computer/projector
- Audio/visual needs
  - Computer and back-up computer for slideshows
  - LCD projector
  - Power strip and extension cords
  - Computer cables
  - Screen
  - Microphones – fixed/cordless/number

Implementation

- Confirm site host scheduling of facility
- Confirm room arrangements and layout with site host
- Confirm catering/food arrangements (times to serve)

***Keeping it Simple***

- *Eliminate all but the essential items. Attendees will respect the information and forgive the informal plan.*