



FOUNDATION *for* APPLIED CONSERVATIVE LEADERSHIP

GUIDELINES FOR HOSTING A SUCCESSFUL FACL TRAINING

Thank you for your interest in hosting a FACL school.

It's important to know exactly what you're committing to when you agree to host a training.

Before submitting the School Request form, please read these guidelines in their entirety.

After you've reviewed the guidelines and you're confident you can **guarantee a minimum of 20 activists to train**, complete the School Request form here: <http://www.requestfaclass.com/1day>

For scheduling, planning, and promotional purposes, you should submit the form at least 6 weeks prior to the date you are requesting.

Within 1-2 days of receiving your request, we will verify we have a trainer available and let you know if we can confirm the date.

Once your date has been approved and you've secured a venue for the training, we'll create and open the registration page and give you login instructions to track registrations.

Please note, you must have the guaranteed minimum of at least 20 registrations by 14 days before the training, or your school will be cancelled.

If you have any questions, email Deb Hopper at ddh@factraining.org or call her at (314) 972-3755.

As a School Coordinator, you'll be responsible for every aspect of planning and preparing for the school, from selecting the date, to finding a venue and making food arrangements, to filling the room with a minimum of 20 like-minded activists and leaders.

For our part, we'll teach you how to have a successful school, and we'll send one of the best grassroots political trainers in the country to give you and your people a full day of the most effective political training available -- and we'll pay all the bills.

Even if you've never planned an event before, if you follow these guidelines, we are confident you can hold a successful, well-attended school without losing your sanity or sleep.

FIRST, RECRUIT A TEAM

Hands down, our most successful schools are not one-man shows.

Successful, well-attended schools are run by coordinators who resist the temptation to do it all themselves.

Good coordinators recruit a team of people to help with the logistics, and more importantly, turnout.

The more people you have sharing ownership and responsibility for a successful school, the higher the attendance will be -- which translates to more trained activists for you to mobilize and utilize in the future.

Make a list of your best leaders and volunteers. Call them. Explain what you're doing and why this training is so important. Ask them to help you with the arrangements and to recruit others to attend the training.

Then schedule a conference call with your team to get everyone on the same page, divide up responsibilities, and assign tasks with deadlines.

Follow up with team members to make sure all tasks are completed on schedule. Hold additional conference calls to keep them motivated, engaged and on task, as needed.

OVERVIEW OF ROLES TO BE FILLED:

- **Venue Coordinator**

The Venue Coordinator is responsible for choosing a venue that meets our room setup requirements and budget, submitting a contract for approval to FACL, providing the venue with any menus or attendance guarantees required by the contract, and verifying all arrangements with the venue in the days immediately prior to the school.

The Venue Coordinator arrives early the day of the school and checks to make sure the room is set up according to our specifications, the temperature in the room is comfortable, the AV equipment is in place and working properly, any needed directional signs are in place, and any supplies that were to be delivered have arrived.

After the school, the Venue Coordinator is responsible for making sure everything is cleaned up, rented or borrowed items are returned, and nothing is left behind.

- **Food and Beverage Coordinator**

If you are purchasing food and beverages from the venue, you will not need a Food and Beverage Coordinator. Your Venue Coordinator can choose the menu and handle the arrangements with venue staff, and they'll do all the work for you.

If you are ordering food from an outside vendor, you'll need an F&B Coordinator to choose the vendor, the menu, make pickup or delivery arrangements, set up the snacks, beverages and lunch buffet, and clean up afterwards.

- **Registration Coordinator**

The Registration Coordinator is responsible for managing the registration table the day of the school, recruiting volunteers to work the registration table, handling any problems that may arise at registration, and reconciling the attendance once everyone is checked in.

We use a very simple, user-friendly online app for check-in. All you need is an internet-connected device. We'll set up a conference call to train the Registration Coordinator and volunteers the week of the school.

In addition, the Registration Coordinator gathers the supplies that are needed at the registration table, including name tags, extra FACL Student Surveys, and pens and paper for those who have forgotten to bring materials with which to take notes during class.

TURNOUT, TURNOUT, TURNOUT!

The single greatest mistake School Coordinators make is waiting too long to pick up the phone and personally ask other activists and leaders to attend.

Don't make that mistake. Set the pace early.

Filling the class is the responsibility of every member of your team, and it should start with them being the first to register.

Your team's goal should be at least 5 registrations within the first week tickets are on sale.

While emails and Facebook posts are good ways to promote your school to other activists, emails and Facebook posts won't fill a class.

It takes a lot of personal phone calls to identify at least 20 like-minded activists and leaders willing to invest their time and resources to get the training they need to be more politically effective.

That's why it's important to have each member of your team make a list of the people they are going to personally call and invite to the training.

Ask them to send you a copy of their list so you can combine everyone's lists into one master invite list. (An Excel Invite List template is available upon request.)

If two or more of your team members list the same person on their invite list, determine which has the closer/more influential relationship with the person and have them make the call.

Team members should email a personal invitation to the people on their list, and then follow up with phone calls and email reminders until the person either registers or flat-out says, "No!"

As people on the master invite list register, mark an X in the "Yes" column of your master list.

Send the team your updated master invite list regularly so they know who has registered from their list and who to keep calling.

In ADDITION to emails and personal calls to your list, here are a few other suggestions for promoting your school:

- Contact local leaders of ally groups and invite them to come. Urge them to bring their best leaders, and ask them to email their general membership.
- If you have a public personality or official who is respected by the people you're inviting, ask them to be the signer on an email promoting your school.
- Call your donors and ask them to fund scholarships you can offer to your best activists.
- Distribute flyers at political gatherings of like-minded people. (We'll create an easily editable promo flyer for you.)
- Promote the training on your website, Facebook page or Twitter, and ask everyone on your team to do the same. (We'll create a Facebook event page for your school for you to share.)
- Privately message Facebook friends who live in the area and invite them.
- Mail postcard invites to your members.
- Call the people who have registered and ask them to bring another activist with them.

Remember -- The single greatest mistake School Coordinators make is waiting too long to drive turnout. Don't make that mistake. Set the pace early.

Your team's goal should be 5 registrations within the first week tickets are on sale.

Please note, you must have the guaranteed minimum of 20 registrations 14 days before the training, or your school will be cancelled.

THE BUDGET

The Foundation for Applied Conservative Leadership is a 501(c)3, non-profit organization. Our goal is to help you train as many like-minded activists as you can possibly muster. One way we do that is by keeping registration fees low so anybody who really wants to learn how to be a more effective activist can afford to come.

As School Coordinator, your registration fee is covered by FACL. In addition, you have two complimentary scholarships you can award at your discretion.

We offer an Early Bird rate of \$40 for adults and a \$25 Student rate for those who register at least two weeks in advance of the school.

The General Admission registration fee for the one-day schools is \$50 per person. The Student rate, with a valid student ID, is \$30.00.

The registration fees cover the cost of the venue, AV equipment, snacks and beverages, lunch, the credit card processing fees charged by the payment processor, and registration supplies and printing.

The registration fee does NOT cover the trainer's honorarium, airfare, hotel, ground transportation, or meals.

All costs related to the trainer are paid by FACL through the generous support of our donors.

In order to keep registration fees low, it's important you stay within the following budget:

- You must find a venue that costs less than \$350, including the room rental charge, projection screen, and any setup or clean-up fees.
- You must keep food costs under \$15 per person, including all-day coffee, water, and another beverage, a light lunch, and snacks.

Registration Refund Policy: Refund requests must be emailed to ddh@facctraining.org and must include the registrant's name and the school they are registered to attend. Because most venues and caterers require a guarantee of the final number attending three days prior to a school, no refunds will be given for refund requests made less than 72 hours before a school.

CHOOSING A VENUE

It's not difficult or particularly time-consuming to find a venue that meets our budget and size requirements. You can usually do that in 1-3 hours on the phone.

When choosing a venue, think frugal. Our forefathers trained at Valley Forge. We don't need the Ritz.

You can find affordable or even free meeting spaces at community centers, public libraries, churches, schools, club houses, and fraternal organizations like the Lions Clubs, VFW Halls, and American Legion Posts.

Other options include local restaurants with meeting rooms like Jason's Deli, Shoney's, Old Country Buffet, or Ryan's Steak House.

Hotels with meeting facilities are an obvious choice. In almost all cases, food costs at full-service hotels with their own restaurant and catering department, like Marriot, Sheraton, Holiday Inn and Hilton are well beyond our budget.

Hotels that don't have their own restaurant or catering department, such as Holiday Inn Express, Hampton Inn, Country Inn and Suites, and Comfort Inn are your best hotel options. Most of them have meeting rooms that will accommodate 25-30 people classroom style for \$350 or less, AND they will allow us to order food from an outside vendor, which is usually far more affordable.

Questions to consider when choosing a venue:

- Do they have a room available that can comfortably accommodate at least 25-30 people set up classroom-style on the date you want?
- Are there any other groups booked at the same time that would create a noise problem?

- Is the venue within our budget? (\$350 or less for the room rental, projection screen and setup, and \$15 per person for snacks, all day beverages, and lunch.)
- If the venue cannot meet our food budget, will they allow you to bring food in from an outside source, or will they waive the room rental fee if a certain food and beverage minimum is met?
- Is the venue convenient to where a majority of the people you are inviting live?
- Is it easy to find? Is it clean and located in a safe area?
- Is there adequate free parking?
- Will they provide complimentary water and/or coffee service throughout the day?
- Where would lunch be served -- in the same room as the training, in the hallway, or in a separate room? Is there an additional charge to serve lunch in a separate area? (Non-full-service hotels are usually pretty good about letting us serve lunch in their breakfast area at no additional charge.)
- Is there a reliable free Wifi connection in the registration area?
- Are there outlets in the room and power strips for people to charge their laptops?
- Do they give a discount to 501(c)3 non-profit groups?

Now that you know what you're looking for, start making calls and narrow down your venue options.

Here's the basic information the venue will want when you book the room:

The name of the event: FACL Political Leadership School or FACL Campaign Management School (whichever you have booked).

Billing address: Foundation for Applied Conservative Leadership, 101 Washington St., Falmouth, VA 22405

Who will sign the contract? Deb Hopper, FACL Director of Programs (314) 972-3755, ddh@facctraining.org

Primary contact: You, or whoever you recruit as the Venue Coordinator.

The date and time of the event: For Saturday classes, the registration table opens at 8:30 am, class starts at 9:00 am and ends at 5:30 pm. You'll want to have access to the room at least a half-hour before the registration table opens and will be out of the room a half-hour after class ends. (Sunday classes often start later to accommodate church-goers. If you schedule a Sunday class, it's up to you to let us know what time you want training to begin.)

Room setup: The room should be set up classroom-style. Please note, you should not book a room that accommodates less than 25 people classroom-style, even if you're only confident of the 20 minimum you committed to when you booked the school.

The class is note-taking intensive. Make sure students have enough table space to write or use their laptops, and that the venue has adequate outlets and power strips for recharging laptops.

We'll also need a podium, a small table for the trainer's projector, a registration table, a table for beverages and snacks, and a buffet table if lunch is going to be served in the meeting room.

If the lunch buffet can be set up in another room without incurring additional charges, or even in the hallway outside the meeting room, that would be preferable. If that's not possible, it's certainly not a deal-breaker. You can set up lunch in the meeting room and attendees can eat where they sit for the training.

AV requirements: All we really need are a projection screen and power strips. The instructor will bring a projector.

If the acoustics in the room are poor or you anticipate more than 60-70 students, we may also need a wireless lapel microphone plugged into the house sound system.

Food and Beverage requirements: Coffee, water and another beverage, like iced tea, available all day, a light lunch, and snacks for \$15 or under per person.

Budget: Remember, no more than \$350 for room rental, projector, and setup, and no more than \$20 per person for lunch, snacks, and beverages, including tax and gratuity.

Once you've chosen the best venue and negotiated the contract, send it and a credit card authorization form from the venue to Deb Hopper at ddh@facitraining.org.

She will sign and email the contract and authorization form back to you with the primary venue contact copied.

You MUST have the venue contract finalized at least 5 weeks prior to your school.

FEEDING THE MASSES

If the venue is providing all the food and beverages, your Venue Coordinator simply chooses a menu that fits our budget, confirms the service time and setup, and provides the venue with the guaranteed number of attendees on the appointed contract date. The venue staff does all the rest.

If the venue is not providing the food and beverages, you'll need an F&B Coordinator to hammer out all the details and logistics.

The food and beverage budget is \$20 per person. That may not sound like much, but it's not at all hard to do.

For \$20, you could have a cup of coffee and a donut for breakfast, grab a sandwich and a beverage for lunch, and have a cookie or some chips for an afternoon snack.

Keep the menu simple and easy. Something like this is fine:

8:30 am: Coffee, iced tea, water, and a donut, bagel, or a piece of fresh fruit.

12:30 pm: Sub sandwich, chips, a cookie, and coffee, iced tea or water.

2:00 pm: Coffee, iced tea, water, pretzels, and bite-size candy bars.

PAYMENT OPTIONS

There are three ways to pay for school-related expenses.

- FACL can pay the vendor by credit card, either over the phone or by using a credit card authorization form provided by the vendor;
- FACL can send a check to the vendor or venue, as long as an invoice is provided;
- You, or someone else who is local, can pay out-of-pocket then submit a FACL Expense Report form along with copies of receipts, and FACL will promptly mail a reimbursement check.

We're happy to do whatever works best for you.

It's up to you to let us know who needs to be paid, when, how much, and by what method.

SUGGESTED FACL SCHOOL PLANNING TIMELINE

6-8 weeks prior:

- Select your date and submit school request form.
- Recruit 2-3 of your most trusted and capable leaders to help you.
- Hold a conference call for your team to create your invite list, set goals, define tasks, and divide up responsibilities.

5-6 weeks prior:

- Select venue, negotiate contract and send to FACL for signature.
- Start making calls to your invite list.
- Once we have a contract for the venue, we will send a "Save the Date" email to FACL alumni from your state.

Weekly:

- Make personal calls to your invite list.
- Get weekly updates from team members on their assigned tasks, including follow-up calls to their invite lists, and update entire team on overall progress and number of registrations.

2 weeks prior:

- You must have your 20 minimum registrations by 2 weeks before the date of your school or it will be cancelled. So you DON'T want to miss this deadline!
- Recruit 1-2 volunteers to work at the registration table. Send their contact information to Deb Hopper at ddh@factraining.org. She will set up a time to train them by phone on our online check-in process.
- Take inventory of needed supplies and create a shopping list.

Week of school:

- Shop for supplies.
- Review and confirm arrangements with caterer and update them on the meal count.
- Review and confirm times, room setup, and AV arrangements with the venue.
- Print any directional or registration signs that are needed.

Day before:

- Print Class Roster for registration volunteers.
- Print name tags.
- Print surveys.
- Print Registration Forms.
- Get petty cash to give change for any cash registrations.
- Confirm that volunteers know where the event is and the time you need them to arrive.
- FACL sends reminder emails with last-minute details to all registrants, and a final request to complete the survey if they haven't already done so.

Day of event room check:

- Arrive early.
- Unpack any equipment or supplies and make sure nothing is missing.
- Is the room set up classroom-style for the right number of students?
- Is there a podium or table for the instructor?
- Is there a table for the trainer's projector? (Instructor brings projector)
- Is the projection screen placed properly so it can be viewed by everyone in the class?
- Is there an extension cord at the projector table?
- If the room is large, is there a wireless microphone? Does it work? Is the sound system working properly with the volume at a comfortable level for those seated in the back of the room? (Usually not needed if less than 60 students)
- Is the lighting adequate?
- Is the room too hot or too cold for comfort?
- Is there water at the podium for the instructor?
- Is there a beverage station and a snack station for morning and afternoon breaks?
- Are coffee and snacks ready for registrants when they arrive?
- Is the area where you'll be serving lunch set up and ready to go?
- Is there a skirted table set up for registration with chairs and a wastebasket?
- Is the internet/Wifi connection working properly at the registration table?
- Are the registration volunteers there, trained, and ready to begin checking students in?
- Are the restrooms clean and well-stocked?
- Do your volunteers know where the restrooms and smoking areas are located?
- Are there any directional signs that need to be placed?
- If the venue has a public function board, is our event listed?

SUPPLY CHECKLIST

This is a sample list to jog your thinking. You may or may not need these items. If the venue you selected is doing all the set up and clean up, and they are taking care of all the food and beverage requirements, the only items you'll need to bring on this list are the Registration Table supplies.

REGISTRATION TABLE SUPPLIES

- Petty cash to give change for any cash registrations
- Copy of Class Roster
- Copies of Student Survey
- Copies of Registration Form
- Name tags
- Magic markers
- Pens and loose-leaf paper (for students who forget to bring something with which to take notes)
- Double-sided tape to affix directional signs, if needed

EQUIPMENT

- Tables and chairs
- Tablecloths
- Podium
- Coffee pot
- Serving bowls/platters
- Serving utensils
- Coolers/ice buckets
- Extension cords
- Power strips/Surge protector(s)
- Electrical tape to cover power cords to prevent tripping

PAPER GOODS

- Plates
- Bowls (for snacks/chips)
- Disposable cups (hot and cold)
- Forks/Knives/Spoons
- Napkins
- Paper towels
- Trash bags

SNACKS AND BEVERAGES

- Bottled water
- Soda or Iced Tea
- Coffee
- Creamer
- Sweetener/sugar
- Bags of chips

- Whole fresh fruit
- Dessert/cookies/brownies/bite-size candy bars
- Ice