



Propagating the New Work Disability Prevention Paradigm for Disability Benefits & Workers' Comp Systems across North America

FREQUENTLY ASKED QUESTIONS ABOUT PLANNING A SUMMIT

Note: The 60 Summits Project is relatively new. Although we have a central support organization that gets local groups started, but mostly the 60 Summits Project is a grass-roots effort built on local initiative and talent. We are still on a rapid learning curve. As each local Summit is being planned and produced, we learn more about what support groups typically require, what a “normal” planning process looks like, start being able to predict common challenges, and anticipate likely outcomes. The evolution of The 60 Summits Project design and the expansion of our central support services is being driven by the experiences of the local Summit Planning Groups.

1. Who plans and pays for a Summit?

We have seen 2 models. Both have been successful.

- Some Summits have been championed/hosted by one or two organizations who do all the planning. The funds are supplied either entirely or partially by the hosts with the remainder coming from participant registration fees. So far, Oregon, New Mexico, and North Dakota have followed this pattern.
- Most Summits have been or are being planned by an ad hoc consortium of stakeholders, with sponsor contributions and participant registration fees providing the funds. Northern California, Minnesota, Arizona, Ohio, and Florida have been of this type.

2. What role does the 60 Summits Project play in local Summit planning efforts?

At no charge, The 60 Summits Project helps local Summit Planning Groups band together, agree on a shared goal of a Summit event, get themselves organized, and start making preliminary plans. Once a group is formed, we provide them with a mini-manual for summit planners. (All this is made possible in part by contributions from our charter North American sponsor, Prudential Financial).

Once a local Summit Planning Group has gotten off the ground, they decide whether they want their summit to be one of “The 60.” If so, they make a commitment to partner with The 60 Summits Project and to plan an event in keeping with The 60 Summits Project’s principles, values and design. They also decide which specific support services of ours they intend to use, which determines the amount of our fees. Most but not all choose to partner. As an example, of the two groups we got started in Ohio, one decided to work independently, and the other is one of “the 60.”

For our partners, we provide on-going advice and support throughout the Summit planning process, including a more complete Summit planning manual with detailed instructions, templates, and tools. We serve as advisors to the planning group chair or co-chairs. We participate in key meetings by conference call and on-site when possible. Monthly conference calls for chairs across the country will be starting shortly. Dr. Christian and other 60 Summits Project staff participate in the Summit event itself to the extent the planning group desires. Our optional additional services include (a)

developing the Summit final report, (b) serving as the responsible entity for all administrative/financial transactions and (c) providing email communications and a website with resources for Summit planners as well as hosting local Summit planning groups' own websites.

3. How long does it take -- and how much work -- to plan and produce a Summit?

The shortest planning interval so far has been 6 months; the longest has been 18 months; the most common (so far) is 9-12 months. All planning intervals have worked out well. The 6 month schedule was set by a group who felt planning was torture and wanted to get to the "prize" as quickly as possible. They met bi-weekly (though often only a sub-group) for virtually the whole time. The 18 month group initially had great enthusiasm, but had trouble gathering momentum because they only met monthly for a while, then the project got lost on the back burner for a while, and then it took drastic measures to get back on track -- but as the finish line neared, they went great guns and had a very successful event.

Most of the Summit planning groups to date have done a great job choosing leaders and spreading the work among their steering committee and task forces (guest list, agenda/speakers, budget, etc.) The volunteers are enthusiastic and committed (though some fall away as is usual in all groups) and the leadership has been effective at delegating.

Many hands make light work. Prior experience makes it easier, too. Having a good road map avoids unnecessary reinvention of the wheel. In addition, as luck would have it, most groups have had at least one member who has some familiarity with conference planning, communications/marketing, fund raising, and so on.

The 60 Summits Project immediately provides its Mini-Manual for Summit Planners (at no charge) to any planning group we catalyze as soon as it is formed. This manual lays out the step-by-step path to a successful event. It includes advice to the leadership on the challenges of managing a project being conducted by an ad hoc group of volunteers. It also includes a detailed list of specific tasks to be done and suggestions for the best way to accomplish many of them. For any group that elects to become part of the 60 Summits Project, we also provide on-going advice and coaching, templates and samples for database design, brochures, invitations, sponsor packets, and so on. There are opportunities for cross-fertilization with other groups who have already had their Summits or are also in the planning process. We can also provide technical, administrative, financial and other support as needed.

4. How much does a Summit cost?

The cost of producing a Summit can vary widely with the major elements being number of attendees, location, food, and fees charged by project managers, conference organizers, communications / marketing professionals, speakers and facilitators.

If a local Summit Planning Group partners with The 60 Summits Project for most services, and holds a single all-day conference for about 100 people in a nice hotel or similar facility, a rough estimate of a cash budget is approximately \$30,000. Cash needs can be reduced if a local group has the time and ability to do all the work itself, can find free speakers and facilitators, and can obtain in-kind donations of marketing materials, meeting space, food for participants and so on without cash outlay.

Expenses are usually met with a combination of registration fees charged to attendees and contributions from local sponsors.

Thanks to the generous support provided by Prudential Financial, our charter North American Sponsor along with other sponsors of the 60 Summits Project, we can usually make partial matching grants to local groups.

5. What outcomes do Summits typically produce?

The first and most immediate outcome of a Summit is the blossoming of new relationships among people who have not previously viewed themselves as collaborators. Typically, people who meet in the Summit agree to meet again, privately, in order to continue conversations begun at the conference, and to work on projects of mutual interest.

The second and most concrete outcome of a Summit is the report of proceedings, which among other things includes a list of the tangible ideas for improvement and commitments to action made in the Summit. To individuals who attended, the report serves as a reminder of their own personal insights and decisions. To local sponsors and stakeholders, the consistent themes revealed in the consolidated list can also serve as a blueprint for improvement within large and small organizations across the state or province, as well as system-wide change through changes in policy, regulation or legislation.

The third outcome of a Summit is the creation of a coalition or consortium of people in different stakeholder groups who want to become part of an action-oriented group that will stick together and support each other in making sure that the ideas developed in the Summit become realities. This part of the 60 Summits Project is now evolving; we hadn't realized that we would have a role in creating and supporting these coalitions and consortiums until recently. Even before their Summits are held, local groups have declared their intention to remain an "on-going force for change" in their states/provinces. They are now requesting to remain part of the 60 Summits Project after their first Summits. Their members -- especially those with operations in more than one jurisdiction -- want to gain strength by being visibly connected with a dynamic and highly visible national initiative. Also, since the post-Summit action groups are newly-hatched, composed of people who are not accustomed to working together, and are faced with a long list of possible projects produced during the Summit, they will benefit from a templated infrastructure and plan that helps them get started and achieve some early successes. We're now figuring out how to do that.