



CONVENING PLANNING GUIDE

for Member Institutions Interested
in Hosting a Convening

<http://www.cpedinitiative.org/>

INTRODUCTION

Thank you for your interest in hosting a CPED convening!

Bi-annual convenings are at the heart of CPED’s work—they connect a diverse set of institutions with the common goal of collaboration for the improvement of professional practice preparation in education. As a host institution, you will further this goal and have the opportunity to help our members learn from your EdD (re)design accomplishments.

As you begin to plan for the convening, the CPED team invites you to review this guide to assist in preparations. Combining the lessons learned, wisdom of prior hosts, and suggestions from members, this guide should give you an overview of the basic structures, requirements, and “to dos” to plan a convening. The CPED team will, of course, work with you to plan the 3-day meeting. You may contact any of us for support during the convening planning process. Contact information is found within this guidebook.

The CPED Planning Team and I look forward to collaborating to provide a rich and meaningful CPED convening.

Jill A. Perry
Executive Director

TABLE OF CONTENTS

Table of Contents

CPED Convenings in a Glance	4
About the CPED Convening	5
Types of CPED Convening Sessions & Required Space	6
Space	8
Roles & Responsibilities	8
Insurance	9
Finances	9
Budgeting	9
Other Expenses	10
Payment and Reimbursement	11
Annual Dues Waiver	11
Pre-convening Planning	11
Day-to-Day Overview	14
Creating the Agenda	15
Host Presentations	16
On-site Logistics	16
On-Site Registration	16
Name Badges	16
Folders/Packets	17
Meeting Room Audio/Visual Technology	17
Table set-up	18
Presenter needs	18
Coat racks	18
Food Table Set-up	18
Food and Beverage	18
Meals Provided	18
Contact Information	19
Appendices	20

Day-to-day Logistics Outline	20
Budget Planning and Sample Expense Report	22
Norms of Engagement for CPED-organized meetings and activities	23
Hosting Application	24

CPED Convenings in a Glance

Who Attends a Convening

Size:	Approximately 200 people
Participant Roles:	Deans, program directors, faculty, students
Participant Locations:	Schools of Education in the US, Canada, and New Zealand
Participation:	Members come individually or in small teams
Experience:	Some participants have attended convenings since 2007, while for others it will be their first convening.

What is Involved in Hosting or Co-Hosting a 3-Day Convening

Pre-convening:	Half-day workshops (paid, includes coffee and boxed lunch)
Welcome:	Welcome from CPED and host institution leaders
Convening	3 days of large group and concurrent break-out sessions
Breaks:	Throughout the day for bio-breaks and meals
Social Activity:	Planned reception: food, drinks, entertainment
Local Activity:	Optional planned evening activity that showcases something distinct of the locale (optional)
Other Activities:	Other activities to promote community/tourism (optional)

Where Convenings are Held

Options:	Member Institution (preferred) or local hotel
Location:	Space near hotels, restaurants, and other amenities for out-of-town guests
Site:	1 large meeting room, 6 smaller breakout rooms, and informal social/meeting spaces; registration table area; reception site on or off site.

When Convenings are Held

Number:	Convenings occur Biannually
Time of Year:	June and October
Time of Month:	Mid-late month, Monday to Wednesday or Wednesday to Friday
Duration:	3 days
Time of Day:	Generally 8:30am to 5:00pm; reception until 7:30pm

Benefits of Hosting

- Share learning and showcase host institution's CPED-influenced EdD programs
- Engage host institution faculty in CPED activities
- Promote tourism in the host institution's locale
- Cost-neutral activity with actively managed budget
- CPED annual dues waived for fiscal year (1/2 if co-hosted)

About the CPED Convening

The signature activity of the Carnegie Project on the Education Doctorate is a “convening.” The term is meant to convey:

- these meetings are **different** from traditional conferences, and
- the central feature is **coming together** to learn and share.

Members send one to three faculty, administrators and/or students who come to participate in professional development. We have also, at times, invited observers—graduate deans, disciplinary society leaders, and leaders from foundations and agencies—to participate.

Each convening has a specific theme and/or specific goals and a significant amount of work occurs beforehand—on the part of the host and CPED planners—to ensure that those goals are reached. Beyond the particular goals of any given convening, every convening is planned to create an environment where people trust each other enough to share ideas openly, give honest feedback, and respond respectfully in disagreements. See the [Convening Norms of Engagement](#) (also in the appendices).

Knowing that CPED members are far from having all the answers, CPED strives to create a setting that allows members to generate and share ideas. Therefore, five ideas originally created by Chris Golde and her colleagues in the Carnegie Initiative on the Doctorate (CID) grounded the development of the CPED convenings’ goals and agenda. The ideas are:

Idea-centered. Proactive ideas are always at the heart of a CPED convening as a starting point for conversations that might have otherwise turned rapidly to the logistical or political. By starting with, and returning to, ideas participants’ attention stays focused on larger questions of purpose—Why do we want to change our program? To what ends? What are promising strategies? Just as importantly, a convening agenda always includes opportunities to take risks. Convenings give people time and space to try out (and often reject or modify) new ideas. By encouraging true intellectual imagination, new energy and ideas can be tested, regardless of the final outcome.

A mixture of pedagogies. We attempt to utilize a mixture of formats, including large group sessions, campus teamwork time, structured small groups, networking, presentations, and social occasions. Basic pedagogical principles help structure the agenda: the format is changed every few hours so that participants have ample opportunity to actively engage, rather than just listen.

Multiple voices. CPED convenings are deliberately structured to include many opportunities for participants to engage with one another and with the central themes of the meeting, and so it is important that everyone be able to participate fully. We want to provide opportunities for participants to share ideas, both formally and informally, with others in presentations and discussions.

High expectations. It is tempting to acknowledge the amount of work on every faculty members’ plate, and thus set low demands for preparation for a convening. But in fact, CPED sets high expectations and asks each convening participant complete “pre-work” (assignments that relate to the convening theme) in advance of attending the convening. By asking a lot, we send the signal that this is a working meeting and everyone is expected to pull his or her weight. This ensures that convenings are an opportunity to share departments’ work, including their successes and setbacks, with other member EdD work in a spirit of candor and the camaraderie of a shared mission. These meetings are also an opportunity to be accountable to other departments for actual progress made since the group last met and to formulate action plans for the coming months.

Unstructured conversations. CPED convenings include the all-important social components. We seek to provide many opportunities to mix participants and allow for making professional and personal connections. A simple question over wine, a new idea generated over coffee: these are moments of intellectual engagement that can be planned, but not scripted.

Critical Friends: In CPED, the role of critical friends is to support and empower each other by demonstrating a positive regard for people and providing an informed critique of processes and practices (Swaffield, 2008)¹.

Types of CPED Convening Sessions & Required Space

Convening Sessions aim to:

1. Accommodate the growing numbers and diverse needs of members;
2. Provide more ‘hands on’ and engaging learning opportunities about program design that pushes our thinking;
3. Learn from and with each other and as we do strive to improve CPED programs
4. Offer an academic opportunity for those presenting, and
5. Continue to work together as a consortium to develop, test, and improve CPED notions for professional practice preparation.

Two types of sessions take place at CPED convenings—small group exchanges and full group exchanges.

Small Group Exchanges

Several types of small group exchanges are available to promote greater levels of interactivity and engagement for participants in small groups. These sessions happen on any day of the convening in breakout meeting rooms.

Type of	Description	Examples of activities
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¹ Swaffield, S. (2008). Critical friendship, dialogue and learning, in the context of Leadership for Learning. *School Leadership & Management* 28(4). 323-336.

Exchange		
Learning and Innovation	These sessions are planned and executed by one or more CPED members using multimedia. They provide facilitated learning opportunities focused on EdD programs and related topics. They take place concurrently with other exchanges.	<ul style="list-style-type: none"> ● Workshopping ideas ● Program case study ● Flipped learning session ● Share & learn ● Ignite session
Dialogue	These sessions involve facilitation of discussion and dialogue among attendees. The session may be highly organized, or make room for spontaneous discussion and activities. These take place concurrently with other exchanges.	<ul style="list-style-type: none"> ● Roundtable ● Fishbowl ● Jigsaw ● World cafe ● Film screening & discussion ● Challenge room ● Speed dating ● Book/article discussion ● Networking
Professional collaboration and Creation	These sessions facilitate the development of professional relationships among CPED members through the creation of research plans, resource development and other professional opportunities. These sessions take place concurrently with other exchanges.	<ul style="list-style-type: none"> ● Research pitch activity ● Writing pitch activity ● Collaborative syllabus development ● Collaborative material creation (program policy or documentation; assignments; assessment rubrics) ● Arts-based activity ● Team/trust-building activity

Full Group Learning Exchange

This session will be presented to the full attendance of the convening and should be engaging, learning-focused, and interactive. These sessions happen on days 1 and 2 of the convening in the large/primary meeting room.

Type of Exchange	Description	Format/Examples
Inspire	This session is organized to provide a largely uni-directional planned presentation to the CPED community. This session contains a table discussion that is meant to be informational as well as inspiring.	<ul style="list-style-type: none"> ● Guest speaker ● Fireside chat ● Debate ● Training on resource, program tool, curriculum etc.

		<ul style="list-style-type: none"> ● Crowd-sourced audience questions
Discovery	This session generally involves multiple presenters/leaders who facilitate planned, fast-paced discovery and incubation of new ideas and innovations. This session contains a table discussion.	<ul style="list-style-type: none"> ● Lightning papers/ignite ● Pecha kuccha ● Campfire discussion ● (Virtual) Poster session

Space

Different types of sessions require different types of spaces. Below is an overview of the space needed to run a convening.

1. **Large meeting space:** a large primary meeting space for all participants to assemble at round tables, with presenter space at the head of the room (approximately 200 people).
2. **Breakout space:** a series six of smaller “breakout rooms” for concurrent sessions, ideally with flexible space (approximately 20-40 people); workshops held on the first morning will also use these spaces.
3. **Informal areas:** meeting spaces in which participants can meet for coffee and discussion.
4. **Reception space:** one evening will require a space for a reception which sometimes includes poster sessions.
5. **Board meeting space:** the CPED Board of Directors often meets on the first morning at one or both of the convenings. A small break out room can be used for this meeting.

Roles & Responsibilities

Convening planning is divided between the CPED team and faculty and staff members of the host institution, known collectively as the Convening Planning Team. Ideally, the convening planning team works collaboratively with the Host Institution. In some instances, autonomy is given to the host institution to make decisions based on their knowledge of the location, culture, and context of their organization. In other instances, the CPED team will make recommendations based on their experience with past convenings. The Convening Planning Team will strive to meet weekly (or on an as-needed basis) starting approximately six months before the convening is scheduled to take place.

Below is an outline for which each entity (CPED or the host) is responsible for what aspect of planning. A more in-depth description of these roles can be found in the following pages.

The CPED team -- Executive Director, Associate Director, Operations Manager, and Graduate Assistant-- works together and is responsible for:

- convening marketing

- registration management, including fee collection
- registrant information collection, including dietary restrictions, accessibility requests, and guest information
- program content-- themes, presenters, large and small sessions
- guest speaker management
- convening agenda design
- name badge generation

The Host institution (which generally provides 2-4 core planning team members) is responsible for organizing

- hotels—blocking rooms, securing reasonable rates and securing booking information
- meeting space—securing and setting up
- technical support and WIFI
- technology for virtual sessions (consult with CPED team to learn more)
- food and beverage for all participants and guests
- securing local transportation
- on-site logistics
- volunteers
- photocopying and assembling convening package (CPED team will arrive early to help when needed)

Insurance

As the host, we expect that your institution has general liability insurance that will cover any liability issues. CPED also holds general liability insurance that will cover the organization should it be necessary.

Finances

CPED will support the associated costs by providing the Host institution the sum of the registration fees (normally \$150 USD per participant). Many Host institutions have created a budget based on the \$150 per participant plus the funds that would have been incurred from the cost of two to three host faculty to travel to the convening plus the Host institution exemption from paying annual dues (\$2500) for hosting a convening.

Example: 2500 (dues) + 6000 (member travel) + 30,000 (200 participants x \$150) = ~\$38,500

Budgeting

The host is generally responsible for covering the cost of:

- Meeting space rental

- Local transportation
- WIFI access
- AV set up for all rooms
- Presentation materials: chart paper, markers, stickies, tripods, etc.
- Participant materials: name badges, lanyards, folders and materials
- Photocopies: all convening related copies
- Food- one lunch, 4 breaks, continuous coffee/tea service, one reception minimum, non-alcoholic beverages and drink tickets for 1-2 alcoholic beverages at reception
- Virtual meeting presentation: for the ability to offer virtual participation in the convening (Contact CPED team to learn more)
- Additional materials: some host institutions assemble “swag bags” for members. Items have included university gear, local tourism gear, etc. Providing a swag bag is not mandatory and should be decided at the discretion of the host.

A comprehensive budgeting Excel workbook will be sent to you with this guidebook. **The Host institution is expected to send a budget to the CPED team within one month of the convening.**

Other Expenses

Guests of Participants: Guests of registered participants may be charged an additional fee to attend reception/dinner/events.

Additional Activities: If the Host institution wishes to arrange an additional travel/tourism activity for participants at an additional cost, all activity arrangements must be made by the Host institution, and the cost of the activity per person communicated to the CPED team. This additional activity cost will be added to the registration webpage and charged to participants who sign up for it.

Convening Workshops: CPED offers workshops that take place before the start of the convening on the first day. Workshops generally take place in one of the breakout spaces where AV and tables are already set up. CPED will cover the cost of coffee/tea, water, and a boxed lunch and any photocopies needed for workshops.

Board of Directors Meeting: The Board of Directors meeting may take place before the start of the convening on the first day. These meetings generally take place in one of the breakout spaces where AV and tables are already set up. CPED will cover the cost of coffee/tea, water, and a boxed lunch and any photocopies needed for the Board meeting.

Payment and Reimbursement

The Host institution will cover any upfront expense and will be reimbursed for convening fees within the total of registration fees (i.e. \$150 x N participants). CPED will collect registration fees through its registration management system. Normally, convening registration fees are *not* taken on-site. After the convening has ended, the host institution will provide CPED with a final invoice that demonstrates the cost of the convening expenses to be reimbursed with registration fees, the cost of additional expenses—workshops, board meeting, tourism activities. CPED will reimburse the host within two weeks of receiving these invoices.

Annual Dues Waiver

June convening hosts receive a waiver for the immediate upcoming fiscal year, e.g. June 2014 convening, waiver FY14-15. October convening hosts will receive a waiver for current fiscal year, e.g. October 2014, waiver FY14-15. Institutions that *co-host* a convening with another institution will only be exempted from paying half of the annual dues.

Pre-convening Planning

Planning for a convening begins one year to six months prior to convening

- JUNE Convening: June 1 – December 31
- OCTOBER Convening: October 1 – April 30

The following is a list of pre-convening to dos:

1. Establish a primary Point of Contact (POC)

Designate a key person at your institution to serve as the POC between CPED, the host institution, and the hotel(s) where members will stay. This makes planning and coordination of details much easier.

- **JUNE Convening Deadline**
Provide the POC and contact information no later than November 30th to info@cpedinitiative.org | 412-648-7428
- **OCTOBER Convening Deadline**
Provide the POC and contact information no later than April 30th to info@cpedinitiative.org | 412-648-7428

The POC can be the CPED PI, an administrative person, or conference coordinator at the host institution. The POC should be able to commit to organizing and/or delegating the organization

of all items listed in the Roles and Responsibilities section, and able to arrange/attend meetings with the convening group as needed.

2. Arrange Hotel Accommodations

- Select a hotel (one, if possible) within close proximity to campus and to restaurants in the area that offers comfortable, clean, and affordable accommodations.
- Seek clarification about the hotel's policy on block reservations and room releases (i.e. if a deposit is required and/or non-refundable). **Note:** Host institution should not guarantee any rooms.
- Block rooms and rates for the convening schedule **plus** the day prior to the start to accommodate travel schedules.
- Note if continental breakfast is served for free or at a cost.
- Strive to find a hotel that offers accommodations for those with accessibility needs.
- If the hotel is not within close proximity (>15 minute walk), negotiate transportation to/from convening site if possible.
- Negotiate group/institutional rates that include internet and, if possible, transportation to/from the airport.
- Book a block of rooms with a cut-off date for reservations 30 days prior to the convening (block 10-20% more rooms than the anticipated).
- Provide CPED Operations Manager (info@cpedinitiative.org and 412.648.7428) with the following hotel information:
 - Name & location (address)
 - Contact information
 - Group rate and booking code
 - Phone and website link for booking
 - Distance and transportation
 - If breakfast is included
 - Other relevant details (e.g. airport, transport options, etc.)

Notes re: Accommodations:

- Guests make their own reservations with the hotel directly.
- The CPED Operations Manager will coordinate with POC to compare registration numbers with hotel booking numbers to ensure all CPED participants have booked accommodations space.
- The POC should keep track of accommodations bookings and be prepared to find an additional hotel/accommodations for registrants if the first hotel block(s) fill to capacity.

3. Secure Meeting Spaces

- Arrange meeting space on the host institution campus, if possible, in hotel otherwise.
- The primary (large group) meeting space should comfortably accommodate approximately 200 people and should have technology capabilities for PowerPoint, video, and amplified sound for presentations.
- The primary meeting space should have

- round tables that seat approximately 8-10 people and allow participants to easily see the presentation area,
- head table for 4-6 people, and
- podium, microphones (stationary & mobile), and lavalier microphones available.
- Arrange registration space outside of primary meeting space with 2-3 long tables and chairs.
- Arrange 6 break out rooms in close proximity to primary meeting space that can
 - accommodate 20-40 people each,
 - have PowerPoint projectors, screens, Ethernet/wireless internet,
 - enable computer connections (make note if there are only computer hookups in the rooms)
- Virtual presentation capability- (CPED is working to incorporate a virtual participation option. Please speak with the CPED team about planning this option.)
- Occasionally, we need space for hanging or displaying posters.
- Signage throughout building to direct participants.

4. Arrange Local Transportation

- Arrange transport to/from the hotel if the meeting location is not walking distance from the hotel.
- Provide clear instructions (and signage if necessary) about transportation to the CPED Operations Manager and, ideally, at the hotel.
- A pre-convening letter to participants may be left with hotel or having student ambassadors meet member to facilitate getting participants to convening location.

5. Provide Information for Website

- CPED team will post convening travel, accommodation, and any other activity details on the website. Please provide these details by:
 - February 1st for June Convening
 - July 30th for October Convening

6. Keep up on Registration

- Approximately two to four months before the convening, CPED staff will eblast an invite to register and book hotel to all CPED members.
 - Registration for June convening Invitation opens ~February 15th
 - Registration for October convening Invitation opens ~August 1st
- Participants will be asked to register for the convening, pay registration fees, and book their hotel via the website.
- Participant registration information will include requests for dietary restrictions or other accommodations, as well as additional guests.
- A list of participants will be generated from this registration and shared with the host POC.
- CPED team will send reminders to CPED membership up until the registration deadline to encourage members to register:

- Registration Deadline June Convening: ~May 15st
- Registration Deadline October Convening: ~September 15th

7. Select and Finalize Food and Beverage

Final food and non-alcoholic beverage costs should be finalized based on the registration numbers following the deadlines. Generally, smaller numbers tend to stay for the third day of the convening. Dietary restrictions may apply to some guests.

The following meals/breaks/drinks should be ordered:

- Day 1: morning workshop and Board meeting, afternoon break, reception (may also be on day two)
- Day 2: morning break, lunch, afternoon break
- Day 3: morning break

Coffee and water should be available all day on each day.

Some events, such as the reception or dinner, may accommodate the guests of registrants. Additional costs for guests should be negotiated with the meeting site and communicated to the CPED team so that the registration page can provide the guest option information.

Convening receptions/dinners are meant to be social affairs. In terms of providing alcoholic beverages, the provision of drink tickets for one-two alcoholic beverages at a reception/dinner has been the norm.

Day-to-Day Overview

The convening covers three days, Monday -Wednesday or Wednesday-Friday, with half days on the first and last days. The 'traditional' agenda is shaped as follows:

Day 1 (half day with morning option)

Morning: 8:00am-12:00pm (optional)

- Not mandatory at all convenings, but may be reserved for add-on events such as orientations, workshops, student sessions etc.

Afternoon: 1:00pm-5:00pm

- Convenings generally starts at 1:00pm with registration beforehand
- Full consortium sessions and breakout sessions will take place until 4:30 or 5:00pm

Evening: 5:30pm and beyond

- The host institution is welcome to host a cocktail or dinner event or the evening can be free for participants to enjoy the local eateries

Day 2 (Full day)

Morning: 8:30am start

- Participants should get breakfast on their own but light snacks and coffee should be provided throughout the morning
- Morning will consist of full consortium sessions and breakout sessions

Awards: 12:00-12:30pm

Lunch: 12:30-1:30pm

- Lunch should be served to all participants usually as a buffet or boxed lunch

Afternoon: 1:30pm-5:00pm

- Light snacks and coffee should be provided throughout the afternoon
- Full consortium sessions and breakout sessions will take place until 4:30 or 5:00pm

Evening: 5:30pm and beyond

- The host institution may decide to do a reception or a free night depending on what was done the first night.

Day 3 (Half day)

Morning: 8:30am start

- Participants should get breakfast on their own but coffee should be provided throughout the morning
- Morning will consist of full consortium sessions and breakout sessions

NOTE: coffee and water should be available all day and throughout the convening.

Creating the Agenda

The agenda is planned by the Convening Planning Team which will begin to meet weekly for the six months in advance of the convening.

The Convening Planning Team will create the theme call for exchanges. The CPED team will manage the receipt, review and acceptance of exchanges and workshops. The blank agenda will be created in a google doc for all members to add to as the agenda is created.

Revised 8/2018

Sample Agenda from Past Convening

Monday	
12:30pm	Registration
1:00pm	Welcome, Convening overview
1:30- 2:45pm	Learning Exchanges A
2:45-3:15pm	Break
3:15-4:30pm	Learning Exchanges B
4:30-5:30pm	Full Consortium Session
5:30pm	Receptions, dinners, free evenings
Tuesday	
8:30am	Welcome and overview
9:00-10:15am	Learning Exchanges C
10:15-10:45am	Break
10:45am-12:00pm	Full Consortium Session
12:00-1:00pm	Lunch
1:00- 2:15pm	Learning Exchanges D
2:15-3:30pm	Full Consortium Session
3:30- 4:00pm	Break
4:00-5:30pm	Learning Exchanges E
5:30pm	Receptions, dinner, free evenings
Wednesday	

Host Presentations

- a) The Host institution is invited to present their program in a creative and interactive format that will allow for participants to learn from the host's EdD program design as well as for the host institution to utilize participants to receive critical feedback.

Ideas for these exchanges include:

- Student poster presentations,
- Practitioners involved in program design/teaching
- Case study of an innovative aspect of the host EdD program
- Faculty sharing and learning about distinctions in instruction and/or advising

This presentation format is generally done in the form of two concurrent breakout sessions to allow for intimacy with members. The CPED team will work with you on planning these.

- b) The Dean of the Host institution will be given 15 minutes to welcome participants at the start of the convening. If your institution wants other dignitaries to participate, please let the CPED team know.

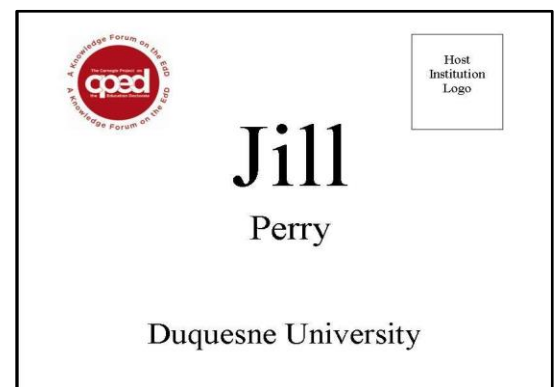
On-site Logistics

On-Site Registration

- Registration tables should be located at the main entrance of the primary meeting space.
- The CPED team will arrive a day before to facilitate the registration set up and work with host team on last minute details.
- Two or three aids (host students or faculty) are generally needed the first day to assist with registration. It is useful to have a volunteer on subsequent days to be available for addressing problems or giving information/directions.
- It is helpful to have a master list of participants and extra name tags for dealing with any problems that might arise.

Name Badges

- Name tags should be standard size and able to hang around the neck or clip to clothing
- CPED team will prepare name tags and email them to host for printing
- Host team will supply lanyards or clips.
- Name badges will use the following format. Please provide CPED operations manager with your logo.



Folders/Packets

- CPED materials to be included will be provided ahead of time and shipped or emailed directly to the host institution (normally between 1 and 2 weeks).
- The host institution is responsible for photocopying and assembling packets.
- Each participant should receive a packet that contains (at the very least) the following:

Prepared by CPED staff and sent to host:

1. Convening agenda
2. Participant list – first & last name, institution, email address
3. Media waiver

Provided by Host:

4. Name tags with clips/lanyards
5. Host institution information: campus map, EdD program information, School of Education information, other promotional materials
6. List of local restaurants and amenities
7. Map of the area (if needed)
8. Phone numbers for taxi/shuttles/hotels
9. WIFI information (if applicable)

Meeting Room Audio/Visual Technology

To implement the convening, the following AV materials and resources will be needed:

- For primary meeting room:
 - a projector, screen, and internet capabilities
 - audio (including wireless microphone with amplified sound) for podium and head table presenters
 - 2-3 handheld microphones and amplified sound for audience participation
 - Access to a video camera to record guest speakers (need AV person to record)
 - Virtual meeting capabilities
- For break out meeting rooms:
 - a projector, screen, and Ethernet/wireless internet (presenters will bring computers)
 - chart paper, markers and sticky notes
- Please negotiate with the convening location in advance that the following will be provided:
 - audio-visual staff member on-hand for full three days to help with set up and troubleshooting
 - wireless access to the internet
 - Mac & PC cords (if available)

Table set-up

- In the primary room, roundtables that seat 8 people with tablecloths.
- Tables should have pitchers of water & cups (or a water station nearby)
- If available, pens/pencils/pads/tent signs (if needed) can be put on tables in the primary and breakout rooms.

Presenter needs

To display pre-work assignments, some convening presenters may need access to Tripods, Post-It chart paper, markers and other supplies. CPED staff will be in communication to alert you of these needs in a timely manner.

Coat racks

A place to hang coats is essential for the October convening (if location has cold weather).

Food Table Set-up

An area with tables needs to be designated for break and buffets. A coffee station should be set up in a high-traffic/highly visible area.

Food and Beverage

Meals Provided

Breakfast: Most hotels now provide a complimentary breakfast. It is suggested that participants eat breakfast before arrival at the convening. Please confirm with hotel that breakfast is available.

All day: There should be a beverage set-up refreshed throughout the convening. Coffee, tea, waters should be available all day.

Breaks: Breaks generally take place in mid-morning and mid-afternoon. Mid-morning can consist of coffee, tea, and juice refreshers and fruit/muffins for a snack. Afternoon breaks should include beverages and a light snack such as nuts or granola bars- protein-filled is good to keep folks alert!

Lunch: A full lunch will be provided on the 2nd day. Lighter fare is easier for afternoon work. Includes coffee and light dessert.

Reception: A hosted welcome dinner or reception should be provided one evening of the convening (either the first or second evening). The host institution has an opportunity to

highlight local cuisine and offer an opportunity for Host students and faculty to mingle with CPED participants through informal or formal presentations.

Guests: Some members may bring a guest to the social events, i.e., reception, dinner. If the hosting institution needs to charge a guest fee, please inform the CPED staff well before registration starts.

Dietary restrictions: The CPED team will ask members for food allergies/preferences on the registration form, and will notify the host institution POC. We generally have a few vegetarians and gluten-free folks. Ensure that the convening site is given plenty of notice about dietary restrictions, and that food orders are clearly marked. If a dietary restriction cannot be accommodated, please inform the CPED team.

Accessibility needs: The CPED Leadership team will ask members for any additional information in relation to accessibility needs and accommodations. However, the POC should consult with the convening manager to prepare in advance for participant requests to meet accessibility needs.

Contact Information

The CPED team are available to help plan the convening. Please refer to the list below to select the appropriate person for assistance.

Carolyn Carlins, CPED Operations Manager

carolyn.carlins@cpedinitiative.org

Office: 412-648-7428

Contact regarding: Registration and fee payment, website & promotion of convening, general attendance questions, and transfer of payment to Host institution, on-site program and hotel logistics.

Debby Zambo, Associate Director

Debby.zambo@cpedinitiative.org

Contact regarding: Learning Exchange review and selection process.

Jill A. Perry, Executive Director

jillaperry@cpedinitiative.org

Office: 412-624-7272

Contact regarding: Convening program content and design, materials preparation, general hosting

CPED Mailing Address:

Carnegie Project on the Education Doctorate
c/o University of Pittsburgh School of Education
5522 Wesley W Posvar Hall
230 South Bouquet Street
Pittsburgh, PA 15260

Website for convenings: <http://www.cpedinitiative.org/page/conveningevents>

We look forward to working with your institution!

Appendices

Day-to-day Logistics Outline

Pre-Convening Prep:

Printing

- Program booklets (provided by CPED team)
- Session materials
- Other instructions, information, maps, etc.
- Institution information

Signage

- From hotel(s) to conference space
- To the registration table
- Break out rooms
- WiFi access

Registration

- Assemble welcome packages (agenda, participant list, campus map, EdD program information, School of Education information, other promotional materials)
- Print/Assemble name tags (with additional blank name tags)
- Print 2-3 copies of full registration list
- Pens, paper on hand

- WIFI information

Convening Day 1

	Time/Activity	Staff
6AM	Set up Registration (name tags, folders, totes) Signage on campus	1 staff; 2 volunteers
7AM	Registration OPENS—Materials needed: Master List, Laptop, Pens/Pencils, Welcome Packages	1 staff; 2 volunteers
7:30AM	Deliver Chart paper and markers to session rooms Confirm food/beverage service in rooms	1 volunteer
8AM	Wayfinding from hotels to conference space	2-4 volunteers
8AM	Check workshop sessions (if applicable)	
9AM	Main room set-up Student posters, snacks, etc.	1-2 volunteers
11AM	Check on lunches for workshop sessions (if applicable) List of folks who get special diet meals	1 staff member
12PM	Convening opening	CPED Staff, Provost, Dean
2-4PM	Check on sessions	1 staff; 1 volunteer
5PM	Check reception preparations	1 staff
5:30PM	Clear snacks/Chart paper from rooms Clear registration	1 staff; 2 volunteers
7:30PM	Begin reception clean-up/prep for next day	Staff and volunteers

Convening Day 2

	Time/Activity	Staff
7AM	Set up Registration (name tags, folders, totes); Signage on campus; Confirm food/beverage service in rooms	1 staff; 1 volunteer
7:30AM	Registration OPENS—Materials needed: Master List, Laptop, Pens/Pencils, Welcome Packages	1 staff; 1 volunteer
8 AM	Convening begins	1 volunteer
9AM	Chart paper and markers in rooms	2 volunteers
9:30AM	Clear snacks/baskets for lunch setup	1 volunteer
11AM	Check on lunches List of folks who get special diet meals	1 staff member
11:45AM	Lunch begins	
1PM	Host University Presentation	Host institution staff
2PM	Chart paper and markers to rooms	1 staff; 1 volunteer

3PM	Check on sessions	1 staff
4PM	Plenary session- Handouts for plenary session	1 volunteer
5:30PM	Clear snacks and baskets Clear registration Clear EdD posters and stands	Staff and volunteers

Convening Day 3

Time/Activity		Staff
7:30AM	Set up Registration (name tags, folders, totes); Signage on campus; Confirm food/beverage service in rooms	1 staff; 1 volunteer
8:30AM	Chart paper and markers to rooms Set out remaining snacks	1 staff; 1 volunteer
9AM	Convening begins	1 volunteer
9:30AM	Chart paper and markers in rooms	2 volunteers
10AM	Check on Plenary Sessions	1 volunteer
11AM	Check on boxed lunch delivery	1 staff member
11:30AM	Closing remarks	CPED Staff, Host institution staff
1PM	Convening clean up	Remaining staff and volunteers

Budget Planning and Sample Expense Report

The Host institution is responsible for developing a convening budget. Host institutions will not be responsible for covering the costs of pre-convening workshops. An Excel Budget planner template is provided. Anticipated attendance is 200 registrants. Expectation of costs include:

<u>Venue</u>	<u>Administrative</u>	<u>Reception</u>
<ul style="list-style-type: none"> ● Room Fees ● A/V and Internet ● Catering ● Transportation 	<ul style="list-style-type: none"> ● Supplies ● Printing & Photocopying 	<ul style="list-style-type: none"> ● Venue ● Catering

Sample Itemized Expenses (approx. 120 people)	
Itemized description	Total
Transportation- 1 day morning/evening –2 vans/gas	\$184.00
Public Safety- evening duty	\$70.00

Overtime custodial services	\$120.00
AV Equipment handheld mics in audience, wireless mic for podium, videographer	\$75.00
Signage	\$6.40
Printing- Copy Center	\$205.00
Printing- internal	\$219.00
Supplies (chart paper, markers, name tag holders, tickets)	\$665.00
Transportation – 3 days morning/evening – 3 trolleys	\$1,875.00
Morning I (coffee, light snacks throughout morning)	\$275.00
Morning II (coffee, light snacks throughout morning)	\$275.00
Deli Lunch Buffet	\$1,425.00
Afternoon break	\$194.33
Dinner- BBQ	\$2,100.00
Dinner bartender and beverages	\$1,269.00
Dessert- churned ice cream	\$350.00
Dinner entertainment	\$350.00
Box lunch to go	\$729.57
Snacks for breaks	\$216.00
Promotional souvenirs (notepads, lanyards, tote bags, etc.)	\$920.00
Total Expense	\$11,523.30

Norms of Engagement for CPED-organized meetings and activities

1) CPED members engage with each other to make decisions about the EdD. CPED members work together critically to examine the professional preparation needs for the EdD and, through experimentation and implementation, make decisions about best practices. All decisions are made reflectively, thoughtfully, and creatively. By actively sharing their EdD program decisions and experiences, members are co-creators of the CPED framework and co-laborers in program preparation activities organized within CPED.

2) CPED members are active, respectful, and courteous listeners. In conversations, they listen to learn from and with each other. Space is made for the ideas and questions of everyone (including those who are marginalized and/or under-represented). Preconceived notions and self-promotions are put aside. CPED members are attendant to sharing and receiving background information to provide insight and understanding where there may be differences among individuals, programs, and contexts.

3) To ensure the highest quality education doctorate programs, CPED members serve each other as critical friends. From an inquiry standpoint, they strive to offer authentic, productive feedback in a manner that encourages and supports continuous improvement. When conflicts

arise, CPED members disagree without being disagreeable, critique ideas rather than of individuals, and offer suggestions based on institutional knowledge, research, and best practices. Members never shame or blame. Program and other information are not shared beyond critical friends without explicit approval.

4) CPED members respect and value the time they have together and apart. Time is valuable and important to CPED members whether they are working as a Consortium, in smaller groups, or one-on-one. When CPED members meet in outside groups they are respectful of each other's time. Respect is shown by being prepared for meetings, giving full attention to speakers and colleagues, following instructions, and participating actively with an open mind.

5) CPED members share ideas and resources. CPED members are committed to using CPED's Framework to design their professional doctorate programs. They support each other by sharing their ideas and resources openly and honestly. Credit is given to the originators of materials and other creative work, and permission is asked to share materials.

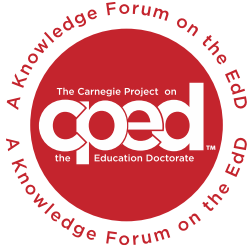
6) When information is shared or data are gathered within an institution, or across the consortium, it is credited and kept confidential. Where appropriate, knowledge and materials produced CPED community members is made available as open access (OA) and open educational resources (OER) documents. Members recognize that information that is highly confidential may not be appropriate to share at CPED activities.

7) CPED members collaborate with various organizations. CPED members connect with various organizations to promote their work and the work of others. Members actively seek formal and informal opportunities to connect, share, and exchange information and resources within and beyond the CPED organization.

8) CPED members promote CPED. CPED members incorporate CPED's Framework into all aspects of their programs, display the CPED logo on materials, and promote the CPED vision and mission in presentations, publications, and program materials. In their practice, CPED members are advocates and ambassadors of the organization.

9) CPED members strive for excellence through high impact practices and continuous improvement. CPED members are innovators with high standards and integrity. Members aim to create and disseminate presentations and publications that are high impact and that serve their stakeholders. Members actively evaluate their perspectives and practices using trustworthy evidence for continuous improvement.

10) CPED members promote accessibility and inclusion. CPED members embrace and celebrate difference, and strive to ensure activities are accessible to individuals with disabilities, and to those who are marginalized, disadvantaged, and underserved. Wherever possible and appropriate, members ensure that discussion and materials are designed to promote inclusion and barrier-free access.



CONVENING HOST APPLICATION

Date: [Click here to enter a date.](#)

Institution Name: _____ **Location:** _____

Contact Name at Institution: _____

Meeting Support Contact Name: _____

(Primary Oversight of Convening)

Email: _____ **Telephone Number:** _____

A convening is the signature activity of the Carnegie Project on the Education Doctorate. The term is meant to convey not only that these meetings are different from traditional conferences, but also that the central feature is *coming together*. Typically, there will need to be a convening space large enough to hold 200+ people at round tables with a small stage/podium at the front with additional space for a beverage set-up and buffet-style set-up. Additionally, six breakout rooms (that hold up to 35 people each) with close proximity to the large convening space will be needed. This application is meant to serve as a guide and compliment to the convening hosting manual to help you, the potential host, determine the resources and space you have available to be able to host CPED. In terms of funds to support the convening, please refer to the planning manual.

Hosting

Preferred Month: June October

Are faculty and Dean(s) on board?

June

October

Administrative Support

YES

NO

Institutional Size

Can institution accommodate 200 participants?

YES

NO

Partnerships

Is there university that might co-host?

YES

NO

If YES, provide name(s)_____

Describe the status of your CPED-influenced EdD program

Setting

- Designing and developing
- Implementing
- Experienced

- Rural
- Urban
- Suburban

Proximity in miles to closest airport(s)? _____

Transport costs to/from closest airport(s) (Taxi/Uber/Shuttle): \$

Attractions / Amenities (please describe)

Full Consortium Session and Breakout Rooms:

Consortium Room

Breakout Rooms

Capacity

Availability of six breakout rooms YES NO

Registration Table YES NO

Classroom style YES NO

Podium & Microphone YES NO

Seating in breakout rooms for 25-30 YES NO

Rounds YES NO

Easels and flip charts available YES NO

TECHNICAL SUPPORT

Each room should have the capacity for audio/visual needs (WiFi, PowerPoint, projection unit, large screen, etc.) and technical staff to assist with any issues that may arise.

Audio Visual/IT

Full time technical staff available on site?

YES Fee \$
NO

Screen availability

YES Fee \$
NO

Projector

YES Fee \$
NO

Teleconference Capability

YES Fee \$
NO

WiFi

YES Fee \$
NO

Professional Photography On Site

YES Fee \$
NO

Professional Video Recording On Site

YES Fee \$
NO

STAFFING

Who will have primary oversight of the convening development? _____

Will this person be on-site throughout the convening? YES NO

Additional Staff

Availability of volunteers.

1-6
6-15

Business Center/Clerical

Document center available for copies?

YES Fee \$
NO

HOTEL/FOOD & BEVERAGE

Hotel

One - five miles from campus YES NO

Block/group rate availability for approx. 200 rooms YES NO

If yes, what is the rate? \$

Food/Beverage

Onsite catering available? YES NO Fee \$

Fully staffed for duration of function? YES NO Fee \$

Venue to accommodate 200 for luncheons? YES NO Fee \$

Venue to accommodate 200 for reception? YES NO Fee \$

Is a conference coordinator available? YES NO Fee \$

Is a service fee included? YES NO Fee \$

Miscellaneous:

Are buses/vans available for transport? YES NO Fee \$

Is the university able to comp a reception or dinner? YES NO

Are any signs available on campus for convening participants to direct foot traffic and vehicle traffic? YES NO Fee \$

Please provide any other estimates or other costs your institution might incur below:

	COST	DESCRIPTION
\$	<input type="text"/>	_____
\$	<input type="text"/>	_____
\$	<input type="text"/>	_____
\$	<input type="text"/>	_____
\$	<input type="text"/>	_____
\$	<input type="text"/>	_____

NARRATIVE

Describe in 800 words or less, your institutions involvement with CPED, its EdD program and reasons for wanting to be a Convening host. Indicate:

- Any program highlights or ways your institution might be showcased during the Convening
 - What types of events and sessions might your university provide (a poster session or guide book, etc.)
 - How your institution might improve by hosting a CPED convening
 - List any significant challenges CPED and the host institution might encounter when hosting
-

Thank you for your application!