

# The Role of Program Planning Teams & Guidelines for Education Forums

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## What is a Forum?

An AIA Seattle *forum* is a half, full-day, or multi-day continuing education program focused on a specific theme or topic. Forum topics are prioritized based on member needs and AIA Seattle's mission, vision, values, and imperatives. A forum can be structured in a variety of ways, and may include a keynote address, individual and/or group presentations, moderated panel discussions, breakouts for audience participation, workshops, etc. A forum can be held virtually or in-person depending on the forum's goals, and typically draws an audience of 100-200 participants. Recent AIA Seattle forums include: Medical Design Forum; Climate Summit; Housing Design Forum; Community Engagement Forum; Design for Learning Forum.

## Who Is the Planning Task Force?

The planning task force is an invited group of ~6-8 individuals with demonstrated expertise and interest in the forum topic. Planning task force members enjoy collaboration, and are active in their professional and community networks. The planning task force commits to meeting with AIA staff regularly for 4-5 months, or until the forum planning is completed. Through mostly bi-weekly meetings and a little outside work, planning task force members volunteer ~3-6 hours a month leading up to the forum. The planning task force may include a Chair or Co-Chair role depending on the needs of the program.

## Role of the Program Planning Team:

**Define the theme or topic.** What is the overarching focus of the forum?

**Define the audience.** Who are the primary target audiences for this content? Who needs to be in the room for it to be successful? What are partnerships or communications strategies that might reach our specific target audiences?

**Develop learning objectives.** What are the main educational goals of the forum, and how do these objectives inform the program?

**Decide sub-topics and format for education.** How can the topic be broken up into meaningful, manageable sub-topics? Are those sub-topics best served by panel discussions, keynotes, interactive sessions, or other learning formats?

**Identify and invite speakers and facilitators.** Who are the local experts that could address the sub-topics? Is there a need or opportunity to seek a speaker from outside our geographic area? Will you have an emcee or moderators to facilitate? Are any sessions curated from a call for presentations? Who will moderate panel discussions if you have them?

**Assist with promotion.** Let your professional community know about the event and encourage them to come! Utilize your networks, social channels, office blog, etc. to help get the word out. After the event, consider a report-out to capture key takeaways.

**Participate!** Plan to attend the full day, participating as a speaker, facilitator, or attendee. If requested, support staff with set-up or take-down of the event. All planning task force members receive complimentary registration and credits for their participation.

**Evaluate.** Get together after the event to review what was successful, what was challenging, and what we should consider for next time.

## Role of AIA Seattle Staff:

**Facilitate task force meetings.** The Programs Manager convenes and guides the planning task force, schedules meetings, drafts agendas, organizes planning tools, and tracks progress and implementation.

**Select the date.** Staff calendar our programs up to a year in advance.

**Select the venue.** Staff will identify and contract with a venue that is centrally located, has adequate technology and facilities, can accommodate an audience of 100-200 people, and fits within our budget and other program needs. If the program is virtual, staff will manage the online platform and handle all technological logistics.

**Handle logistics.** Task force members won't need to worry about catering, materials, or other logistics. However, the task force can weigh in on specific requests, like having a happy hour at the end of the day.

**Finalize a program title and description.** Communications and programs staff will select a forum title and program description based on task force input.

**Submit for learning units.** AIA has a specific process for acquiring learning units. Generally, we are not authorized to provide learning units for other disciplines, but we can explore that in specific instances.

**Set price and manage registration.** AIA Seattle has a consistent pricing policy and standardized registration that we use for all continuing education programs.

**Coordinate confirmed speakers.** Once the task force has confirmed a speaker, staff will take over and follow-up about logistics and include a speaker agreement, recording authorization (if applicable), and collect promotional materials like headshots and bios, etc.

**Promote event.** Typically, staff launches the forum eight weeks in advance of the program date(s). The launch includes a marketing campaign with original graphic design components, compelling program descriptions, and the day's schedule and speakers.

### Forum Goals:

**Provide thought leadership.** Forums should reflect the most relevant knowledge about the practice and profession of architecture and the built environment.

**Push the profession forward.** Forums should address the challenges and opportunities of the highest impact areas for the profession to consider in creating and sustaining a better built environment.

**Meet member education needs.** Forums should provide a high level of peer-to-peer educational content and aim for HSW continuing education credits (ideally 6-8 for a full day).

**Support networking.** Forums offer the opportunity for professionals from a variety of disciplines to come together around a specific industry segment or topic. Forums should include adequate time for networking and collaboration.

### Guidelines:

**Include research.** AIA Seattle has a goal of featuring original research on design and construction in all its major educational programming.

**Connect to advocacy.** While a forum is focused on professional education, it may feature opportunities to advance the chapter's advocacy by inviting an elected official to speak, or including a session on related policy or regulations.

**Demonstrate diversity.** Include a range of experience levels, expertise, genders, and ethnicities among your speaker list and task force. Please note that AIA Seattle has a policy that all panel discussions must include a woman or trans presenter and a presenter of color. In other words, AIA Seattle does not host or promote panel discussions that represent only cis-gendered men and only white people.

**Offer HSW credits.** Our members need HSW education credits, which must be related to health and safety or sustainability education. Aim to provide at least half of the learning credits be HSW.

**Manage the number of speakers.** A packed program with too many multi-speaker panels can be exhausting for attendees, and puts pressure on our budget for complimentary attendance. Complimentary admissions for speakers are limited to 12 per day (or no more than 10% of projected attendance).

### Planning Timeline:

5-6 months out – Convene Planning Task Force, Hold Venue

4-5 months out – Kick-off Planning, Set Goals & Objectives, Book Venue

3-4 months out – Develop Program, Invite Speakers, Prep Marketing Materials

2-3 months out – Confirm Speakers, Solidify Event Details, Prep for Program Launch

1-2 months out – Continue Marketing, Host Prep Calls w/ Speakers

0-1 month out – Prep Final Event Logistics, Deliver Forum