

9

Learning Days/ **Summits**

Coordinating NSG Toolkit
Module 9 out of 9

Introduction to Module 9: Learning Days/Summits

One of the ways that we put the Neighbourhood Small Grants (NSG) principle of “we learn together” into action is through NSG Learning Days, or “NSG Summits”. These one or two day events bring together NSG Project Leaders and participants, Neighbourhood Grants Committee (NGC) members, Program Coordinators, and staff from Partner Organizations and funders of the program to share stories and skills, discuss best practices, attend presentations and workshops, and build relationships with one another. Although in the past they have sometimes been organized by Vancouver Foundation with province-wide participation, they are now usually organized by the Network Lead organization of an NSG Regional Network, bringing together the communities within that region.

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Guide to Planning **Learning Day**



9.1

Guide to Planning Learning Day

One of the ways that we put the Neighbourhood Small Grants (NSG) principle of “we learn together” into action is through NSG Learning Days, called “NSG Summits”. These one or two day events bring together NSG Project Leaders and participants, Neighbourhood Grants Committee (NGC) members, Program Coordinators, and staff from Partner Organizations and funders of the program to share stories and skills, discuss best practices, attend presentations and workshops, and build relationships with one another. They are usually organized by the Network Lead organization of an NSG Regional Network, bringing together the communities within that region.

The following is a list of potential steps involved in organizing an NSG Learning Day that also includes tips from past organizers and feedback from past participants. You can use this as a checklist, or simply as a general guide to get you started. Every NSG Learning Day event is different, so please feel free to add other items, delete those that aren't relevant or rearrange the order of things. Or, just use this to get ideas and create your own!

The Planning Process

Tip: Ensure you give yourself enough lead time to organize the event - past Learning Days have required about 4 months of planning.

- Create a core team of organizers to work on the event planning. This group can have a lead organizer(s) to make final decisions, or each person can take the lead on a specific task or area.
- Consider who you want to have represented on your organizing team. Your team should include representatives that are or have been NSG Program Coordinators, Project Leader and NGC members as they will all have important perspectives that are useful in planning. Your team should also reflect the diversity of your communities.
- Choose how often to meet, taking into account the required work and organizers' schedules. Do you want to have more frequent but shorter meetings or less frequent but longer planning meetings? Or longer meetings interspersed with shorter check-ins?

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Google Docs →
docs.google.com/document

- Set some ground rules around decision-making and group process so that everyone feels comfortable with the process and that their voice is welcomed and heard.
- Decide whether the planning meetings should be facilitated and by whom - one core person or with a rotating chair?
- Create shared working documents that everyone has access to, such as through [Google Docs](#), to keep NGC members on the same page and keep track of the planning process. These can include detailed to-do lists and timelines for when different items need to be completed. It can even include this document with things checked off as you go!
- Begin the process by developing a budget for the event, and a calendar with major planning milestones that the Committee can refer to regularly throughout the process.
- Review the [“Making an NSG Event Accessible and Inclusive Template” \(see 9.3.5\)](#) . When planning an NSG event, it is important to start planning for inclusion and accessibility early on

Reflect on the Principles of Grassroots Grantmaking

Tip: It can be helpful to explicitly integrate the principles into the agenda of the event as well into the planning. This could include opening remarks about how the principles were integrated into the planning of the event and making lots of space for the expertise and skill in the room.

- Throughout all of the planning process, reflect on the principles that guide the NSG program and find ways to integrate them into the event. This could include, for example, doing community consultation on different aspects of the event, inviting people already involved in the program as presenters and speakers, and highlighting strengths of the local community where the event takes place. See [“Principles of Grassroots Grantmaking” \(see 9.2\)](#) for more information on the principles.

Integrating Past Participant Feedback

Tip: Having clear documentation of the learnings and recommendations that emerge from the feedback and organizer's debriefing of a Learning Day can really help in future planning.

- Review feedback from last year's evaluations, if available and if this is the first time that you are putting together such an event, talk with communities that have organized it before to learn from their experiences.
- The majority of past participants named the Project Leader presentations as their main highlight, enjoying how they provided inspiration, ideas to take back to their communities, and a sense of the impact of the program. Other highlights that were most often named included interactive skill building workshops and small group conversations.
- Many people also mentioned enjoying the chance to feel like part of the larger NSG community, and being able to connect across communities but also across roles (Partner Organization staff, Program Coordinators, Project Leaders, and NGC members).. Opportunities to connect with and learn from each other was considered a highlight but also an area that could be expanded upon. A significant number of people mentioned the level of experience and expertise in the room and wanted further chances to share that with each other.
- The importance of having different ways to engage depending on learning needs or preferences was also mentioned a number of times in past feedback.
- Quite a number of participants suggested planning a range of sessions and activities so that people at different levels of experience could all be engaged/find something suitable for their learning, or expand on this. This could include, for example, having part of the day be workshop streams for people new to the program and more advanced participants. This was also suggested around different kinds of participants - that there be a balance of content provided for everyone and content provided specifically for different groups involved in the program such as Coordinators, Project Leaders and NGC members.

- Another area of feedback was around a desire for what one participant called “deeper dives”. Many participants wanted to use these days to learn how to be more strategic in their work and deepen the impact of their NSG programs, foster deeper and more ongoing relationships in the neighbourhoods where they live and work, and build their capacity to more effectively engage their communities in the goals of NSG. Many participants wanted time to go deeper through question periods, discussion and interactive elements in the workshops and presentations.
- A number of participants requested learning around building community cross-culturally and more diversity of content and presenters. Specifically, a need for more BIPOC (Black, Indigenous, and People of Colour) presenters and facilitators, Indigenous-led content and skills building around forging relationships with and working respectfully with Indigenous communities was named.
- For a number of participants, having things run on time and clear communication around the flow of the day was considered a priority.
- Like in most events, finding the right timing for things was a challenge, with quite a number of people wanting there to be more time for the things they felt were important, but many also finding the workshops and presentations to be too long. This is a balance that can be hard to achieve, but something worth thinking creatively about during the planning process. A number of people suggested the event be spread over two days if this were possible.

Brainstorm and Research Content

Tip: As noted above, the hosts, presenters and facilitators should represent the diversity of the community and the NSG program in general.

- Brainstorm what kinds of activities you’d like to include in the event. Past events have included: short presentations by Project Leaders on their NSG projects; networking and brainstorming sessions; small group conversations; interactive activity stations, including mini-project demonstrations or activities led by NSG Project Leaders; light table topics for optional discussion during lunch; guest speakers;

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and skills building workshops, including ones offered in concurrent sessions so participants have options and can find something interesting to them.

- Consult with NSG Coordinators, NGCs and Partner Organization staff about potential themes for the event and ideas for workshops, interactive activities, and potential hosts, facilitators and presenters, including whether they would be interested in presenting or facilitating themselves. If there is new emerging content it may still require external experts, but many people already involved in NSG can offer workshops and facilitate sessions.
- Consider the purpose of the Learning Day. Priya Parker, the author of *The Art of Gathering: How We Meet and Why it Matters*, explains why knowing the purpose of your gathering is so important. This article provides a good summary: [The Art of Gathering: Start with purpose](https://pcma.org/priya-parker-dont-skip-over-purpose/). If you have been part of the Art of Hosting training, then the materials from that workshop can also be very useful when organizing a Learning Day event.

The Art of Gathering: Start with purpose →

pcma.org/priya-parker-dont-skip-over-purpose/

Reserve Space

Tip: Priorities for the venue should include adequate room for the event's activities (including smaller rooms for concurrent sessions) and for participants to move around and interact, accessibility, location, parking, transit, nearby hotels, and a venue that can provide appropriate catering or accepts outside catering. Outside space, natural light and nice views are also great if you can get them!

- Brainstorm and research potential spaces and reserve a few of the best candidates. Make sure to reserve the venue starting from the afternoon before the event date so you can do the set up the day before.
- Do walk-throughs of potential locations, considering the suitability and accessibility features of each space. Keep the reservation of the best location and cancel the others.

Set Date and Begin Invitation Process

Tip: Consider the timing of the event within the larger timeline of the NSG program - it should be at a time when people are engaged with the program but not during the busiest parts of the year. In the month or two after granting decisions are made often works well.

- Consult with communities/potential partners and set the date.
- Send out a Save the Date notice to Coordinators and Partner Organizations about 6 weeks before the event. A template is available for this ([see 9.4.1](#)) .
- Determine how many participants from each community can be invited. Let Coordinators know the quota for their community and ask them to identify who they wish, with a cross section of Partner Organization staff, NGC members and Project Leaders.
- Discuss livestreaming the event for people who cannot physically attend and gauge whether there is interest in this among potential participants.

Invite Hosts and Indigenous Guests

Tip: As much as possible, following the grassroots grantmaking principles of “we learn together”, consider giving leadership roles such as hosting the event or facilitating group discussions to Project leaders, Neighbourhood Grants Committee members or Coordinators to enable them the opportunity to develop their skills. This may require mentorship and support that you will have to budget as part of the event planning process.

- A welcome from the First Nation(s) on whose territory the event takes place should begin the event. Contact Indigenous community members from the territory the event will take place on and inquire about a welcome, including the protocol around honorariums and gifts. Invite these guests to stay for the whole event if they choose to.
- Identify potential hosts to manage the flow of the event, introduce presenters, set the tone of the event, and make announcements. Hosts can be Project Leaders or NGC members.

- Once you have hosts and welcomers, consult with them about ideas for the event or invite them to participate on the organizing team.

Initial Content Development

Tip: Align the content to highlight and showcase the NSG principles. Plan to include some hyper-local content such as highlighting projects from the host community, hosts from the specific community/neighbourhood where the event is taking place and showcasing the local community and neighborhood's resources throughout the event. As much as possible, include learning opportunities that include justice and equity in order to tie in the principle of "everyone is invited".

- Decide on the number and types of skill building workshops and guest speakers presentations you'd like to include. Determine the number of Project Leader presentations that can fit within the allotted time. NSG project stories always receive the most positive feedback of any aspect of the event. As such, it can be a good idea to give them adequate time. Consider leaving room for discussion and questions after the presentations.
- Shortlist workshop facilitators and guest speakers and start to contact facilitators about their interest, availability and provide them the event details. Consider including mini-project demonstrations or activities led by NSG Project Leaders.
- Work with Coordinators to identify NSG projects to showcase, potentially including ones with an interactive component they can demonstrate.
- Plan an artmaking component as part of the concurrent sessions or during the break.
- Decide on where in the agenda you'll put networking and brainstorming sessions and small group conversations. Consider creating light table topics for optional discussion during lunch.
- Plan a strong ending to the day, such as a team building activity, an activity that includes music or movement, or a surprise announcement of a new aspect of the program. Ending on a high energy note leaves people feeling inspired and excited.

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- Find something that provides hyper-local content to celebrate the community in which the Learning Day takes place.
- Leave time at the end for people to fill out a feedback form if they choose to do so on site and to make an announcement that a digital version will be sent out within 48 hours of the event.
- Develop the first draft outline of the day. Ensure that the amount of content is manageable with the time available and allows breathing space for transitions, interactive activities, and for participants to connect and discuss.

Preliminary Logistics and Event Registration

Tip: Try to have registration be digital/paperless. Having paper that needs to be signed at the event, such as a media release form, can be cumbersome. Instead try to have it be an opt-in/opt-out process when people register online before the event.

- Start tracking expenses. A “Learning Day Expense Tracking Template” ([see 9.5.2](#)) ↓ is available for this.
- Block rooms at a nearby hotel for people who may be coming from out of town.
- Identify potential caterers for breakfast, lunch and afternoon snacks. Food must include options for people with food preferences, restrictions and needs. Add allergies or dietary restrictions to the registration form so that you know of any participant's have ahead of time and order meals accordingly. There should also be snacks, tea, coffee and other beverages available.
- Create a registration process (such as with [Eventbrite](#)). A registration notice and form template is available ([see 9.4.1](#)) ↓. About four weeks before the event, send the registration link out. Send weekly reminders until the registration deadline, which should be around 1-2 weeks before the event (give yourself time to open up any remaining spots if any of the communities couldn't fill their quota of participants).

Eventbrite is an easy online platform to manage registrations →

eventbrite.ca/#/sell-tickets

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- Finalize contract with the venue.
- Begin to track registrations as they come in. A template for this is available ([see 9.4.2](#)) ↓. Start a waitlist if needed.
- If planning to livestream, which is highly recommended, look into what will be involved and notify people in the NSG community that they will also be able to participate in this way.
- Research local NSG-participant owned and BIPOC (Black, Indigenous and People of Colour) led businesses that you can support for purchasing supplies, catering, graphic design, printing the program and so on.

Content and Agenda Development

Tip: Ensure that interactive activities on the agenda have enough time. For example, brainstorming often needs a few hours at least. Keep in mind the level of expertise that is already in the room, and leave space for that to be shared. Encourage facilitators to make sessions interactive and engaging.

- Review the draft agenda with the times/activities mapped out. A sample agenda is available for inspiration ([see 9.3.2](#)) ↓.
- With skill building workshops and group discussions, decide whether it makes more sense to have mixed participants, or if you want to break some into specific groups, such as beginners and more experienced participants or different kinds of participants (Project Leaders, Program Coordinators, and NGC members).
- Share the agenda with Partner Organization staff, hosts, Coordinators and so on for feedback.
- Begin to draft the program for the day. It can include things like the agenda, bios of presenters and information about the logistics of the day. It needs to be drafted and designed in time for feedback to be integrated. See the [“Learning Day Sample Program”](#) ([see 9.3.3](#)) ↓ for an example of a program.

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- Set in-person or virtual meetings with the facilitators and presenters.
- Finalize the welcome from the local Indigenous community.
- Finalize hosts and begin to share details about the content of the event, including the theme and the goal of integrating the guiding principles of the NSG program into the event. To make the role of host successful, try to clearly communicate what you're looking for in the role, schedule multiple meetings to prepare them and get their input on the planning, do a site walk-through so they're familiar with the space and how it will be set up, provide detailed speaking notes and ask them to be as interactive with the crowd as possible.
- Contact Project Leaders through Coordinators and give them outlines/guiding questions for their presentations, using the principles as a foundation. Support Project Leaders to create their presentations if necessary or request that Coordinators provide this support.
- Finalize the interactive activities including art making, project demonstrations, brainstorming and networking sessions, table topics for optional discussion during lunch and the end activity. Prepare questions and approaches for networking/brainstorming sessions.
- Finalize content of workshops/presentations and get summaries and bios of facilitators/ presenters for the program.

Event and Space Logistics

Tip: On the day of the event, the people offering the Indigenous welcome, facilitators, presenters and hosts should be well supported, a role that can be divided amongst the organizing team and other program staff.

- Map out the space for the various activities.
- Consider if you want to have raffle tickets and gifts as an incentive for people to stay until the end and if so arrange this.
- Finalize catering for breakfast, lunch and snacks.

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- Arrange for sound and tech set up and decide whether to hire a sound and tech support person.
- Find event support staff/volunteers to help set up and take down and help with food.
- Start to develop a supplies list and to purchase and gather the things you will need. Rent table linens, dining utensils, and centerpiece flowers if needed. Get photo backdrops, collaterals, and any display supplies needed.
- Prepare a PowerPoint for opening and closing remarks and for behind hosts.
- Get presentation files from facilitators and presenters.
- Send the program for design.
- Arrange for anything needed for the people doing the Indigenous welcome, the hosts, facilitators, presenters, people coordinating the interactive activities and so on.
- Assign roles to the organizers for the day of.
- Assign roles and do orientation for volunteers and event staff.
- Confirm details of livestreaming the event, including finding a staff or volunteer to coordinate and carry this out. Consider ways to include people watching the event through livestream in the event. Send out details about the livestream to potential participants.

Final Registration

Tip: Try to be aware of the participants who need to travel to come to the event - do they have special needs to make the trip feel possible and worth it?

- Once the first registration date passes, around 1-2 weeks before the event, open up remaining spots to participants from any community, even those who have filled their quota.

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- If there are more participants interested than available spots, create a waitlist if you haven't already. If spots become available, email the waitlist to fill them.
- Send email to event attendees to confirm their reservations and attendance.
- Determine the number of people coming from out of town and do final reservation of accommodations.

Final Content Development

Tip: Become familiar with the IT needs of the presenters and facilitators, and ensure everything needed is in place for the day of. Having someone able to troubleshoot any problems on the day of can also be useful - this could be someone you hire, a volunteer or one of the organizers.

- A few weeks before the event, bring the organizers as well as a variety of stakeholders (Project Leaders, NGC members, Coordinators, Partner Organization staff) together to get feedback on and finalize the planning.
- Finalize speaking notes for the hosts and meet one last time to go over the agenda and notes together if needed.
- Give feedback on the program design. Receive final program and send it to event attendees.
- Update the participant feedback form ([see 9.6.1](#) ↓) and welcome/host/presenter/facilitator feedback form ([see 9.6.2](#) ↓). Create a version that can be printed out, as well as one on Survey Monkey. Print copies of the feedback form for people to fill out at the end of the event.

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Final Logistics and Checks

Tip: Name tags are always important and having ways to personalize them, including coloured markers and stickers, can be fun and act as an icebreaker for participants.

- Print name tags.
- Compile supplies.
- Do the room set up and final check-in/orientation on the day before the event.
- Check technology and sound system, including livestream.
- Do a final check of catering, event support staff, linen and flower orders etc.
- Do one final check with the hosts, welcomers, facilitators and presenters.

After Event:

Tip: Consider how often you want to host a Learning Day event so that you know when planning for the next one should begin. What is feasible for the organizers and budget-wise? Frequency should be often enough to foster ongoing connections and build capacity within the program while still feasible in terms of budget, time and energy investment.

- Set an initial debrief meeting for the organizers. See the [“Learning Day Organizers’ Debriefing Template” \(9.6.3\)](#) . Consider sending the debriefing template to the core team for them to consider before meeting.
- Compile the feedback forms that were filled out at the event. For those who prefer to do it online after, send a link within the 48 hours at a meeting.
- Send out the feedback form for the welcomers, hosts, presenters, facilitators and so on within 48 hours of the event, with a thank you email.

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- Compile feedback from all of the feedback forms in an Excel spreadsheet and send the data to the organizing committee to go over at the debrief meeting.
- Hold the debrief meeting. As part of the debrief, review the participants' feedback and identify themes and ideas that can be included for next year. Write up notes of anything you want to capture for those organizing the next event.
- Request and pay invoices and honorariums. See the [“Invoice Template” \(9.5.1\)](#) .
- Track final expenses and create the final budget of the event.
- Have a celebration meal together! You can also consider small gifts for hosts and organizing team members as a token of appreciation.

9.2

Principles of Grassroots Grantmaking



9.2

Principles of Grassroots Grantmaking

The following principles guide our mission of harnessing local skills and experiences to make neighbourhoods better places to live. They are at the heart of the Neighbourhood Small Grants (NSG) program.

Everyone has gifts: We use an *asset-based community development* approach to draw upon existing strengths and build sustainable communities. The passions, skills and knowledge of neighbours are the building blocks of community development. The resources necessary for change already exist in each community through asset areas such as physical, human, social, personal, and financial. When neighbours are encouraged and inspired to share and connect their assets, communities are strengthened, and meaningful and lasting change can come from the ground up. Connecting local assets also increases relational networks, helps new groups and associations to form, and grows the neighbourhood's sense of ownership, pride, and ability to work towards common goals.

Small is beautiful: We believe that small scale actions and projects can have far-reaching impact on people and places. We support individual or informal group-led projects with budgets of \$500 or below. No project is too small, and when counted collectively these projects create lasting impact and become a powerful movement of neighbour-led change.

Local decisions: We believe that neighbours know what is best for their communities, so we make sure decisions about projects are made locally. We rely on Neighbourhood Grants Committees – made up of people living in the community – to review ideas submitted by other neighbours and decide which ones to fund. We support our volunteer leaders as experts, solicit and listen to their feedback, offer guidance and skill sharing opportunities, and connect them with each other and resources to help build on their success.

Where we live matters: We take a *place-based* approach to building community. Though our grassroots grantmaking program areas share many commonalities, they are each designed or adapted to meet unique local conditions. In building community, it is the community that is the expert. Projects are done at the neighbourhood level, and these neighbourhoods are defined by the people who live in them. The neighbourhood a person identifies with can provide a rich set of resources and relationships. Projects are led by people who bring these local resources and relationships as contributions to the work, and change happens in a way that is unique to each neighbourhood and the people who live in it.

We learn together: Building a sense of belonging and creating a sustainable community requires certain skills and resources. We seek to empower community members with decision-making abilities and access to knowledge, resources, and opportunities so that they can effectively act together to achieve collective goals.

Everyone is invited: We are committed to welcoming and listening to all voices in local solution-building, and making opportunities for participation accessible and inclusive. We must be conscious of the barriers to action and supportive of efforts to overcome them. When all voices are heard and all ideas considered, projects will represent and highlight the diversity of each community and neighbours will form connections with one another regardless of potential boundaries.

Event Planning: Resources & Templates



[9.3.1 Learning Day Planning Template](#)

This template lists some of the details you may want to track in one place while organizing an NSG Learning Day. This could, for example, be made into a Google Drive document that all organizers have access to and regularly update.

[9.3.2 Learning Day Agenda Template](#)

This is an agenda template for an NSG Learning Day that you can customize for your own event or simply use to prompt ideas on how to build your own.

[9.3.3 Learning Day Sample Program](#)

This is an example of a program from a past NSG Learning Day that you can use for ideas and inspiration.

[9.3.4 Inclusive Event Planning for Coordinators Infographic](#)

This infographic summarizes a few of the main components of organizing an event, such as an NSG Learning Day, that is inclusive of a wide range of people.

[9.3.5 Making an NSG Event Accessible and Inclusive Template](#)

The NSG program is committed to everyone feeling welcome at and supported to participate in our events. When planning an NSG event, it is important to start planning for inclusion and accessibility early on. This template includes some ideas for how to make a NSG event, including your Learning Day, inclusive and accessible.

Outreach and Registration: Resources & Templates



9.4.1 Learning Day Save the Date and Registration Templates

These templates can be adapted to notify potential NSG Learning Day participants to save the date for the event and when registration is open as well as to create the registration form itself.

9.4.2 Learning Day Registration Tracking Template

This template can be used to track the details of each participant's registration.

Event Financials: Resources & Templates



9.5.1 Invoice Template

This invoice template can be customized for processing honorariums. Most vendors and businesses will have their own invoices, but individuals or informal groups receiving honoraria may not.

9.5.2 Learning Day Expense Tracking Template

This template can be used to track the various expenses involved in your NSG Learning Day and to ensure you are staying within your budget.

Feedback and Reflection: Resources & Templates



9.6.1 Learning Day Participant Feedback Template

This template can be adapted to create a feedback form for participants of your NSG Learning Day.

9.6.2 Learning Day Welcomer/Host/Presenter/Facilitator Feedback Template

This template can be adapted to create a feedback form for the people involved in the Indigenous welcome, the hosts, presenters and facilitators at your NSG Learning Day.

9.6.3 Learning Day Organizers' Debriefing Template

This template is for the organizers of an NSG Learning Day to use to debrief after the event has taken place. It can be customized to capture successes, learnings and what you hope to add, change or address next time an NSG Learning Day is organized.