PLANNING GUIDELINES FOR TEXAS LITERACY SYMPOSIA

INTRODUCTION

Literacy Texas has been the fortunate recipient of multi-year funding from the Texas Workforce Commission (TWC) in the form of a grant for Professional Development Support for Nonprofit Adult Literacy Organizations. These funds are used to provide the Literacy Texas Annual Conference, and a series of regional symposia.

TWC's goal is to "provide professional development and capacity building services;" "primary participants are tutors, instructors, administrative staff, and trainers of nonprofit adult education providers in Texas." Staff and instructors at federally funded AEL (Adult Education and Literacy) programs may also attend, but are not the primary audience.

PRESENTING REGIONAL SYMPOSIA

To present quality training that caters for the specific needs of Texas communities, Literacy Texas contracts with regional presenting partners for in-person or online symposia. Half- and full-day symposia are both possible, with the goal being to deliver quality professional development, responsive to local needs, and tailored to the audiences defined above.

More details are on the following pages, along with symposium roles and responsibilities.

Each presenting partner plans their local symposium in consultation with Literacy Texas. After the symposium has taken place in accordance with the guidelines laid out below, Literacy Texas reimburses the presenting partner for qualifying symposium-related expenses, which could include speaker fees, travel expenses for presenters, and staff planning time.

Meals may be included as an expense if they are working meals and documented as such, but awards and prizes, incentives, gifts, and entertainment – among other expenses – are not reimbursable. Please talk to Literacy Texas before making an expenditure if you have any questions about the validity of reimbursements under the TWC grant.

PROVIDING QUALITY PROFESSIONAL DEVELOPMENT

By providing symposium funding, TWC recognizes the value that community-based non-profits and volunteer-based literacy services bring to Texas. All symposia should:

- Keep professional development and capacity building front and center; and
- Deliver quality, evidence-based training for tutors and instructors (volunteer and paid), administrative staff, and trainers of nonprofit adult and family literacy providers in Texas.

Please communicate with Literacy Texas if you have questions or need clarification about any of the terms of the grant or symposium agreement.

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SYMPOSIUM EVENT GUIDELINES

Event Guidelines for all Regional Symposia

Every symposium should:

- Be planned in conjunction with Literacy Texas.
- Include measurable goals, set with Literacy Texas before the event.
- Be responsive to local needs.
- Prioritize quality professional development for a range of audiences.
- Adhere to the planning timeline found on page 4.

Half-Day Symposia

A half-day symposium can be a good way for a new presenting partner and/or region to get started. The whole event can wrap up after the half-day of training, or presenting partners may like to couple the symposium to networking or other non-symposium activities.

Half-day symposia can take place in person or online.

Each half-day symposium should offer at least **5 hours** of quality, relevant professional development (can include concurrent sessions).

Grant funding available for **in-person half-day symposia**:

- **$2,500** to reimburse Presenting Partner for their time spent coordinating the event.
- **Up to $2,500 in additional funds**, to cover the costs of presenters and their travel, venue hire, and other costs noted as reimbursable under the grant.

Grant funding available for **online half-day symposia**:

- **$2,000** to reimburse Presenting Partner for their time spent coordinating the event.
- **Up to $1,500 in additional funds**, to cover the costs of presenters and other costs noted as reimbursable under the grant.

Full-Day Symposia

A full-day symposium is the traditional model that has been followed over the last few years.

Each full-day symposium should offer at least **10 hours** of quality, relevant professional development (can include concurrent sessions).

Grant funding available for **in-person full-day symposia**:

- **$4,000** to reimburse Presenting Partner for their time spent coordinating the event.
- **Up to $4,000 in additional funds,** to cover the costs of presenters and their travel, venue hire, and other costs noted as reimbursable under the grant.

Grant funding available for **online full-day symposia**:

- **$3,000** to reimburse Presenting Partner for their time spent coordinating the event.
- **Up to $3,000 in additional funds,** to cover the costs of presenters and other costs noted as reimbursable under the grant.

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SYMPOSIUM ROLES & RESPONSIBILITIES

Before the symposium, Presenting Partner will:

- Designate an event manager to collaborate with Literacy Texas while planning the event.
- Adhere to event guidelines (page 2) and planning timeline (page 4).
- Track all expenses and in-kind donations on symposium reimbursement form.
- Consult with other literacy providers in the region to determine high-priority needs.
- Meet with Literacy Texas as necessary to set goals, discuss results of needs assessments, determine a symposium theme, plan communications strategies, and formulate the program.
- Recruit quality presenters on a range of topics for a variety of audiences as defined above.
- Secure an accessible, centrally located venue, with capacity for the goal number of attendees, with wifi and sufficient rooms for all sessions, **or** plan an online event.
- Promote the symposium in the region using as wide a variety of channels as possible, using marketing materials developed in conjunction with Literacy Texas.

Before the symposium, Literacy Texas will:

- Schedule periodic planning meetings with Presenting Partner.
- Assist in finding presenters if requested.
- Send certificate of insurance to venue, if requested.
- Set up hosting for online symposia using the Literacy Texas Zoom account.
- Provide branded graphics and wording for use in communications by Presenting Partner.
- Host website listing and online registration, and manage all pre-event registrant reminders.
- Provide regular registration reports to Presenting Partner.
- Provide supplementary marketing through website, newsletters, social media, etc.

On the day of the symposium, Presenting Partner will:

- Coordinate all needed technology, and communicate with presenters about technology.
- Provide lunch and drinks for all attendees, accommodating reasonable dietary restrictions.
- Provide everything attendees need for the day (e.g., program, handouts, signage).
- Coordinate staff and/or volunteers to set up, run check-in, assist, clean up, etc.

On the day of the symposium, Literacy Texas will:

- Have one representative attend and deliver opening remarks.
- Provide registration list and/or complete check-in for attendees.

After the symposium, Presenting Partner will:

- Submit reimbursement form and supporting receipts within 2 weeks after the symposium.

After the symposium, Literacy Texas will:

- Send post-event communications, surveys, and certificates to attendees.
- Provide a summary report to Presenting Partner, for discussion at debrief meeting.
- Approve symposium invoice and issue reimbursement to Presenting Partner.

SYMPOSIUM BASIC PLANNING TIMELINE

Major planning milestones are outlined below – the list is not comprehensive.

TWC grant year runs September 1 – August 31; symposium year runs September–June.

Summer of preceding grant year (July and August):

- Expressions of interest in being a Presenting Partner in the coming grant year and bringing a half- or full-day symposium to a specific region.
- Presenting Partners communicate preferred symposium date(s) to Literacy Texas.
- Literacy Texas prepares Letters of Agreement for Presenting Partners.

New grant year begins. By mid-September:

- Presenting Partners return signed Letters of Agreement to Literacy Texas.
- Presenting Partners designate event managers.
- Literacy Texas publishes complete symposium calendar for current grant year.
- Initial planning meetings for event managers and Literacy Texas event coordinator. On the agenda of the initial planning meeting:
  - o Review and add to list of regional partners and other local agencies.
  - o Discuss plans for needs assessment with key agencies in the region.
  - o Discuss possible themes and topics (final decision after needs assessment).
  - o Discuss audiences as determined by the grant, and plans to reach each one.
  - o Set registration goal and strategy, and discuss venue and online options.
  - o Outline communications and advertising plans, and how Literacy Texas can supplement Presenting Partner's efforts.

12 weeks before symposium date:

- Presenting Partner completes local needs assessment, communicates results with Literacy Texas.
- Presenting Partner and Literacy Texas finalize symposium theme.

10 weeks before symposium date:

- Presenting Partner reserves venue (or Literacy Texas creates Zoom link).
- Presenting Partner finalizes schedule outline (i.e., start and finish times, session timings).

6 weeks before symposium date, or earlier:

- Presenting Partner finalizes full program for the day (i.e., session titles and descriptions, presenters) and sends all information to Literacy Texas for listing on website.
- Presenting Partner sends venue information, including parking details, to Literacy Texas.
- Literacy Texas finalizes online registration.
- Presenting Partner and Literacy Texas set up email invitations and social media campaigns.

TX LITERACY SYMPOSIA
EXCELLENCE IN ADULT LITERACY

Professional Development Support for Nonprofit Adult Literacy Organizations
LETTER OF AGREEMENT BETWEEN
Literacy Texas and Name of Organization

Literacy Texas is the statewide literacy coalition, connecting and equipping literacy providers through resources, training, networking, and advocacy. Name of Organization is a regional, community-based literacy organization located in City or Region, Texas. This letter of agreement is written specifically based on the objectives of the Professional Development Support for Nonprofit Adult Literacy Organizations grant, funded by the Texas Workforce Commission.

The objectives of the initiative include supporting professional development symposia at no cost, for organizations that do not receive Adult Education and Literacy funding from the Texas Workforce Commission. Each symposium will fulfill the objectives of the initiative through training sessions on topics relevant to adult and family literacy organizations, and topics identified by the regional needs assessment conducted by Name of Organization.

The YYYY-YY Name of Symposium **Literacy Symposium** is currently scheduled for Day, Month Date, YYYY.

The total amount of funds available for this symposium will not exceed funds allotted to the specific symposium. Literacy Texas and Name of Organization agree to collaborate on the following items **up to** $8,000 of the allotted funding for Name of Organization.

Literacy Texas agrees to:
1. Host symposium and registration information on the Literacy Texas website.
2. Provide travel expenses of Literacy Texas staff for symposium planning and delivery.
3. Complete all required grant reporting.
4. Provide support in identifying, securing, and approving trainers.
5. Provide dissemination and analysis of symposium evaluation.
6. Other elements as outlined in the *Planning Guidelines* document.

Name of Organization agrees to:
1. Adhere to written event guidelines and planning timelines.
2. Provide targeted marketing of the symposium to defined regional audiences.
3. Provide meeting space and resources necessary for the symposium.
4. Provide stipend/honorarium or any fees associated with trainers/presenters.
5. Provide day-of, on-site symposium support.
6. Other elements as outlined in the *Planning Guidelines* document.

If this letter of agreement is acceptable, please sign below and return to Literacy Texas.

_____   _____
Steve Banta, Executive Director, Literacy Texas   Date

_____   _____
Name, Title, Name of Organization   Date