



## **Live Education Subcommittee Charter**

### **Purpose**

The purpose of the Live Education Subcommittee is to oversee the planning, development, and execution of NAPFA's Spring and Fall Conferences, Annual Large Firm Forum, and any other live educational events related to the organization. Under the direction of the Education Committee, the Live Education Subcommittee identifies relevant, unique, and compelling topics which will be a part of the live education programs offered by NAPFA. The subcommittee ensures that these events align with the organization's educational initiatives, mission, and provide valuable learning opportunities for all participants.

### **Subcommittee Membership**

This subcommittee is to be composed of:

- 5-6 NAPFA members from key demographic segments
  - 1 Subcommittee Chair
  - 1 Subcommittee Vice-Chair
  - 3-4 Subcommittee Members (2-3 subcommittee members to sit on Conference Planning Task Force and 2-3 subcommittee members to sit on the Large Firm Forum Planning Task Force)
  - 1 Education Committee Liaison
- The NAPFA staff member with responsibility for this area

When selecting members, the Education Committee and NAPFA staff will seek members based on these prioritized criteria:

1. Members must regularly attend NAPFA conferences and webinars
2. Members who have been involved in other NAPFA educational offerings: conference committee, webinar committee, regional symposiums or study groups
3. Each member brings demographic representation to the committee: firm size, region, industry tenure, age, gender, race, and other minority groups
4. Members with ties to the academic work who would lend that perspective and have ideas for bringing content into NAPFA educational offerings
5. Members who regularly attend non-NAPFA conferences and webinars
6. Members with experience in educational programming or educational content
7. Members who are active in the NAPFA community who can draw on their NAPFA network to help identify volunteers for various committees/working groups

Members shall serve for a two-year term, with an optional third year if serving as committee Chair.

The role of Chair shall be determined by the NAPFA staff and approved by the Education Committee.

### **Subcommittee Responsibilities**

The Live Education Subcommittee will have the following responsibilities, and any other responsibilities reasonably related to its purposes as assigned by the Education Committee:

**Live Conferences Oversight**

- The committee will plan and oversee the direction of NAPFA's Large Firm Forum, Spring and Fall conferences as organized by NAPFA.
- Ensure that conferences are well-structured, engaging, and provide valuable learning experiences for attendees.
- Identify general session and breakout session speakers that align with program direction.
  - Subcommittee reviews and ranks proposals received.
- Identify pre-conference session(s) that align with program direction.
- Support the execution of the event marketing plan as directed by NAPFA staff.
- Participate in scheduled calls with keynote speakers and breakout session speakers new to NAPFA conferences.
- Review speaker presentations to ensure accuracy, appropriate education content and relevancy to the program description.
- Subcommittee chair in conjunction with the Education Committee draft welcome letter from entire committee for program agenda.
- Subcommittee and Education Committee has the opportunity to volunteer to introduce speakers
- Participate in onsite conference activities (i.e. introducing speakers, attending ancillary programs, etc.).
- Attend and participate in post conference debrief call.

**NAPFA Staff Responsibilities:**

- Coordinate speaker introductions.
- Coordinate the process of collecting presentations and following up with speakers to answer questions and/or respond to comments.
- Edit and include thank you to sponsors details in drafted welcome letter from the chair.
- Provide committee with conference and speaker/session survey results.
- Draft scripts for speaker introductions.

**Additional responsibilities of NAPFA Staff include:**

- Coordinating conference logistics:
  - Site selection and contracting with the host venue
  - Housing management
  - Vendor selection and management (AV, security, photographer, entertainment etc.)
  - Venue management and meeting room coordination
  - Exhibit hall layout and management
  - Food & beverage selection
- Developing and managing conference budgets.
- Coordinating with all speakers including the following:
  - Negotiating contract terms
  - Securing engagement letters
  - Securing completed continuing education forms
  - Identifying and securing the required AV systems
  - Securing all speaker presentations and handouts
- Develop program agenda.

- Review program agenda to ensure balance in core subject areas of CE and CFP CE.
- Develop and execute the event marketing plan.
- Facilitate the creation of event website and mobile app.
- Facilitate the distribution and analysis of session and post-event surveys.
- Acquire event exhibitors and sponsors.

#### **Subcommittee Operations and Milestones**

3 months out	90% of breakout session speakers/topics confirmed
2-4 months out	Begin weekly planning calls
1-3 months out	Keynote speakers confirmed
1 month out	Conference registration opens (program 85% confirmed)
	Follow up calls with speakers to confirm topic/review NAPFA audience
	Review presentations as received
1 Week out	Keynote speakers confirmed
On site at event	Discuss open issues
1-4 weeks post event	Attend scheduled calls with keynote speakers
	Discuss speaker introducers
	Participate on final pre-show call if needed
	Actively participate in conference program and activities
	Participate in program committee survey
	Review conference survey

#### **Subcommittee Operations & Milestones**

- The subcommittee will meet monthly for one-hour conference calls, then weekly as programs near launch.
- Members should expect to contribute time outside of the monthly conference calls to adequately prepare for meetings and otherwise fulfill the responsibilities of this subcommittee.
- The subcommittee Chair will review and oversee the agenda and lead committee meetings.
- NAPFA staff shall provide ongoing management and support for the committee's operations.

#### **Review and Assessment**

- The subcommittee will review and evaluate the current slate of educational programs and materials offered by the NAPFA.
- The subcommittee will conduct regular assessments to ensure the content remains relevant, current, and meets the needs of the target audience.

#### **Ad Hoc Projects**

- The subcommittee will manage and execute ad hoc educational projects as directed by the organization's leadership.
- The subcommittee will provide timely updates and reports on the progress and outcomes of these projects.