

2017

CAREER *expo*

Career Expo Project Handbook

Last Updated: November 17, 2017

Table of Contents

- Table of Contents 1**
- Event Timeline 3**
- Icon Legend 4**
- Historical Perspective – A Letter 5**
- 1. Project Initiation 11**
 - 1.1 Project Team 11
 - 1.2 Kick-Off Meeting 12
 - 1.3 Communications Management 14
- 2. Project Planning 20**
 - 2.4 Planning Meeting 20
 - 2.5 Project Business Plan 22
 - 2.6 Stakeholder Presentations 22
 - 2.7 Facilities 23
 - 2.8 Action Items 23
- 3. Project Preparations 25**
 - 3.1 Media Solutions 25
 - 3.2 Booth Participation 26
 - 3.3 Event Equipment 27
 - 3.4 Collateral 28
 - 3.5 MeetingSmart 28
- 4. Project Execution 30**
 - 4.1 Volunteers 30
 - 4.2 Registration Tool 31
 - 4.3 Logistics 32
 - 4.4 Day before logistics 32

- 4.5 Day of logistics..... 33
- 5. Project Closeout 35**
 - 5.1 After Actions..... 35
 - 5.2 Hold Closeout Meeting 36
 - 5.3 Award Project Team 37
 - 5.4 Prepare Closeout Report 37
 - 5.5 Prepare Budget Final Report..... 38
- 6. Financial Management..... 38**
 - 6.1 Budget Overview 38
- 7. Finished 40**
- Appendix A: Team Charter..... 41**
 - 1. Team Purpose 41
 - 2. Team Ground Rules 41
 - 3. Duration and Time Commitment..... 42
 - 4. Scope 42
 - 5. Members..... 43
 - 6. Supporting Resources 43
 - 7. Deliverables (KPI's)..... 44
 - 8. Roles Descriptions..... 44
 - 9. Team Collaboration Site..... 46
- Appendix B: OneNote/Outlook Correlation 47**
- Appendix C: Original Focus Group Feedback Summary..... 50**
- Appendix D: Focus Group Root Cause Analysis..... 51**
- Appendix E: Focus Group Recommendations 52**

Event Timeline



The event time line is stated at the beginning of each phase. However, these may fluctuate slightly as planning begins. This is a guideline. Again, the event is always held in summer, typically July, to capture the most Interns. However, should that month change, all guidelines need to be adjusted accordingly.



Historically, the expo is a **one – day event, three hours long.**

Usually held near the lunch times to allow people to use their lunch time to attend the event. Due to the growth of the event, there may be benefit to holding later in the day to allow those after shift to attend to the event also, or even expanding the number of hours of the event. It could minimize the crowding aspect.

Icon Legend

ICON	Description	Notes
	Areas needs to be refreshed annually	
	References file location path information	
	Information to be stored in Sharepoint	Image Redacted
	References MeetingSmart tool to be utilized	
	References OneNote tool to be used.	Interface between OneNote and Outlook may be inferred.
	Historical perspective	
	Milestone achievement	
	Timeline indicator	

Historical Perspective – A Letter

Dear Project Lead and Team,

Congratulations for being a part of an informative, exciting, well-anticipated Career Expo! As you begin this journey of leading and preparing an event that employees look forward to, it will help to learn more about genesis of the event, its scope and perspective, and the year over year improvements that have been made to the Career Expo since inception in 2014.

History

The initial report presented to Maura Legal, Vice President in August of 2014, initial report showed that the pipeline lacked diversity. The report was based on three focus groups sessions held between the locations. The population included in the group were females, African Americans, with low salary bands that were in the organization.

They were asked questions such as: “What role do you play in managing your career?” and “What factors influence your decisions as to whether or not you stay with a company?” The common concerns disseminated from those groups were:

- Underutilized skills
- Improper placement of talent
- Lack of developmental and visibility opportunities
- Lack of career guidance and sponsorship

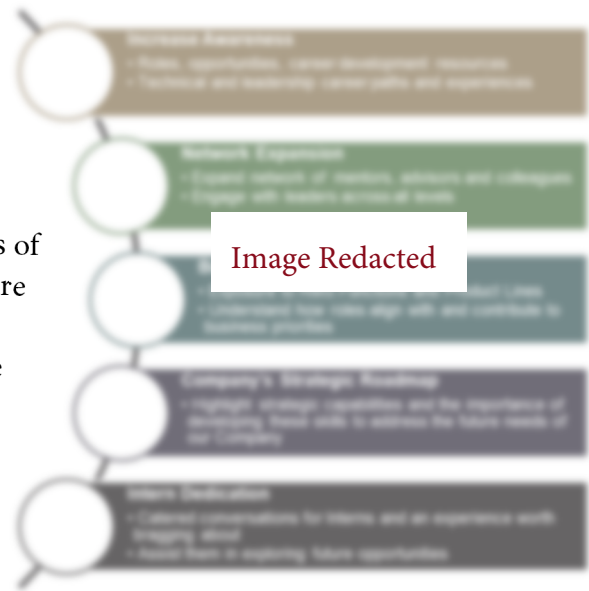
The focus group highlighted the struggles with regard to career development and retention of this population was challenging. The career expo was one of many

recommendations generated from these studies that was included in the report. See Appendix E: Historical Perspective – Root Cause Analysis for more on the recommendations.

In order to execute the event, it need a sponsor, both to champion attendance and to provide the financial budget to execute the event. Maura was asked to be that sponsor, to sponsor the event with involvement of the Talent Council (TC) and the Employee Resource Groups (ERG’s). Maura Legal agreed to be the sponsor and has since been very active with each Career Expo.

Throughout the execution of each Career Expo, the event morphed and evolved. More recently, the team created guiding principles to help communicate the goals of the Career Expo. The goals of the Expo, at a basic level, are to: increase awareness, expand networks, enhance business acumen, support the company’s strategic roadmap and increase intern dedication, as shown in Fig. 1: Guiding Principles.

Fig. 1: Guiding Principles



Not only did the guiding principles morph, but so did the scope of the event. The Career Expo Annual Event Summary (Fig. 2: Career Expo Annual Event Summary) shows you the extent of expansion that this event has undergone since its initial launch in 2014.

Fig. 2: Career Expo Annual Event Summary



Most notable expansion decision included opening the expo to all functional areas of the business, dedicating time for interns only, expansion to Texas TX and then in 2017 a radical departure.

The 2017 Event

In 2017, the expo changed format from years past. A fundamental change was that Global Talent Development (GTD) assumed sponsorship of the event. Global Talent Development as a department, designated an overarching Project Coach, currently Murphy Lee, who supports the learning aspects of Global Talent Development initiatives. The budget for the event execution is within GTD's budget and that budget is dictated by the Vice President of Human Resources, currently Angel Romero Along with that significant ownership specification, there were three other major event modifications that occurred in 2017:

First, the decision to honor the guiding principles and come up with a vision and theme for the expo helped to frame the entire event. In 2017, the team took the queue from the guiding principles and broke them into different "areas" labeled as "Inspiration, Innovation, Information."

Fig. 3: 2017 Career Expo Theme



This theme (shown in Fig. 3: 2017 Career Expo Theme) was disseminated to the team, executive leadership and all functional booth representatives. Each were tasked to come prepared to support one, two or all three of these areas.

Second, was a change in the event layout. Cuing from the theme, the space was divided into the following areas: Inspiration, Innovation and Information. One of the most successful areas was the innovation area. Teams from many areas, functions and disciplines developed a collaborative area, where they were grouped to create islands of “cool things”.

Third, was a decision to implement computerized registration and MeetingSmart invitations. Those initiatives created almost a 70% increase in attendance and that was tracked easily by the computerized registration process.

Handbook

This handbook is designed to provide you (and future teams) with the **basic project stages**:

- Project Initiation
- Project Planning

- Project Preparations
- Project Execution
- Project Closeout

These stages will provide you with a high-level process to execute the Career Expo and while providing some historical context. The time lines are not specific - allowing each team the flexibility to customize and design. Each and every year, the expo has sought to improve. So as you venture into the next Career Expo, I encourage you to let your imagination run and don't accept barriers. Continue to find new and cool ways to connect back to our founding team's initiative of increasing awareness, expanding networks, enhancing business acumen, supporting the company's strategic roadmap and increasing intern dedication.

The handbook includes the following sections:

A **team charter** is intended to be updated at kick off to govern the team's actions. It is located in Appendix A and includes: ground rules, commitment durations, roles, members assigned to specific positions within the team, along with technology uses.

The **communications management** plan will assist the team in defining how it will communicate.

An **icon legend** explains icon's you will see throughout. These will be quick references of areas that need to be updated, technology resources that should be engaged, or references to document storage for more context, templates or archived data.

The intent is for each lead transitioning out to prepare this for the next. Expanding the historical perspective and to update major milestones, if applicable. Each new team will update different areas throughout the project such as the team charter, communication plan, and other major project stage historical perspective. Employees count on us to not forget the legacy reason this event and the sub-events were designed. While this handbook discusses only expo execution, it can be used to formulate execution plans for the quarterly events that the team should be executing to address those initial concerns.

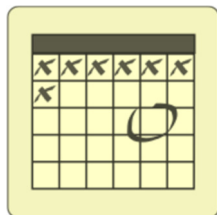
Ajay Day-Coleman

2017 Project Lead

It's time to say goodbye, but I think goodbyes are sad and I'd much rather say hello. Hello to a new adventure.

Ernie Harwell

1. Project Initiation



November – January

(6 – 8 Months from approximate event date, usually in July)

Duration Expectation: 2 Months | Complete by: Beginning of January

NOTE: This handbook is local only.

1.1 Project Team



A project lead's first official act (aside from saying "yes!") is to build the team. Some of the team members from the prior year may re-sign on based on the team charter duration and time commitment requirement. Review the charter for prior year team-members. Consider prior-year surge participants as a selection pool to recruit core members. **Do not delay collecting interest and volunteers to join the team.**

You will need at least 11 **Core team** support volunteers:

- **Project Coach (1)** [*Provided by Global Talent Development – Learning*]
- **Project Lead (1)** [*This is you!*]
- **Floor Representatives (2)**
WARNING: These will be direct charging individuals; this cost is expected in your budget – but you must be cautious to not get too many direct charge employees on the team. See 0 Direct Headcount - \$11,000
- **Operations Representatives (2)**
- **Supply Chain Representatives (1)**

- **Human Resource Representative (1)** [Does NOT include those assigned as coach or lead]
- **Talent Acquisition Representative (1)**
- **Finance (1)**
- **Employee Resource Group Representative (1)**

Recruiting past surge members, contacting the Functional area's HR Director/Managers for suggestions, or using other internal networking to find participants.

Additional criteria to select members should include interest level, availability (see team charter commitment time) and networking influence in their respective areas. Being networked within their area makes execution much easier.



This expo has been executed in the past with primarily HR Representation, Floor Representatives and Operations. The issue is that the other organizations are underrepresented and become secondary focuses in the execution.

1.2 Kick-Off Meeting



January

(7 Months from approximate event date, usually in July)

1. Review/update team charter (see Appendix A)

Review the team charter, update all areas with a live discussion of operations. Some updates can be completed off line, such as core team members, by the project lead. The rest will need to be completed collectively as a team. While the charter is in this handbook, updates should be

completed in the Sharepoint and then incorporated into the handbook for future project leads to reference.



Team Charter (Active Link) **Navigation:**

<http://ecs.com/sites/GTD/careerexpo/default.aspx> → Documents
→ Team Charter

2. Review lessons learned

Compiled within a week of the expo close, these serve as a guide of what not to do, what to keep, and what might need to be integrated. These are based on observations and experiences of the individual team members, which may include participant feedback. Reviewing all year's lessons learned will help the brainstorming process for the upcoming event.



After Actions Survey's, Awards, Etc.(Active Link)

Navigation: <http://ecs.com/sites/GTD/careerexpo/default.aspx> → Documents → After Actions_Survey's, Awards, Etc

3. Review team tracking tools, utilization

Review and poll the team on their exposure, experience and comfortability using the tools: OneNote, SharePoint (Sharepoint), MeetingSmart. Based on the feedback, it may be prudent to have a completely separate training on the basic use and integrations of these tools. Some instructions are offered in the appendices within the handbook, but some members may need hands on tutorials or interactions.

4. Identify potential dates

We usually hold the event in July. The location where the expo has always been held is in the auditorium, all associated conference rooms within that building and may include the cafeteria stage. This facility is highly sought

after and requires booking well in advance. Reserve the facility for 1-2 days prior to the actual event date to allow for facility set-up and prep. Reserving the space is crucial **as soon as possible**.



In the past, the team has petitioned the local Vice Presidents (VP) admins on the best dates given other industry trade show events, high-level executive commitments, or other known conflicts. This event needs VP support. Getting on their calendars early is a significant milestone. Their availability can change but there is a better chance of participation support if the event is on their calendars early.

Event approval is required. See section 3.5 MeetingSmart for information on how to register the event.

5. Communication/Meeting Strategy

Review section 1.3 Communications Management communication strategy to set up frequency/mediums of meetings.

1.3 Communications Management



This strategy is based on the standard Project Management Docs¹ site and should be modified for each project based on the project and goals.

¹ <http://www.projectmanagementdocs.com/project-planning-templates/communications-management-plan.html#axzz4toiiOpxT>

1.3.1 Introduction

This Communications Management Plan sets the communications framework for this project. It will serve as a guide for communications throughout the life of the project and will be updated as communication needs change. This plan identifies and defines the roles of persons involved in this project. It also includes a communications matrix which maps the communication requirements of this project. An in-depth guide for conducting meetings details both the communications rules and how the meetings will be conducted, ensuring successful meetings.

1.3.2 Communication Standards

Standardization is a proven way to simplify the complexities of project management communications. Standardization provides a level of simplicity to an organization's communication platforms and improves effectiveness and efficiency.

1.3.3 Communications Matrix

The following table identifies the communications requirements for this project.

Communication Type	Objective of Communication	Medium	Frequency	Audience	Owner	Deliverable	Format
Kickoff Meeting	Introduce the project team and the project. Review project objectives and	<ul style="list-style-type: none"> • Face to Face 	Once	<ul style="list-style-type: none"> • Project Sponsor • Project Team 	Project Manager	<ul style="list-style-type: none"> • Agenda • Meeting Minutes 	<ul style="list-style-type: none"> • Soft copy archived on project SharePoint site and
Project Team Meetings	Review status of the project with the team.	<ul style="list-style-type: none"> • Face to Face • Conference Call 	Weekly	<ul style="list-style-type: none"> • Project Team 	Project Manager	<ul style="list-style-type: none"> • Agenda • Meeting Minutes 	<ul style="list-style-type: none"> • Soft copy archived on project SharePoint site and
Technical Design Meetings	Discuss and develop technical design solutions for the project.	<ul style="list-style-type: none"> • Face to Face 	As Needed	<ul style="list-style-type: none"> • Project Technical Staff 	Technical Lead	<ul style="list-style-type: none"> • Agenda • Meeting Minutes 	<ul style="list-style-type: none"> • Soft copy archived on project SharePoint
Monthly Project Status Meetings	Report on the status of the project to management.	<ul style="list-style-type: none"> • Face to Face • Conference 	Monthly	PMO	Project Manager	<ul style="list-style-type: none"> • Slide updates • Project 	<ul style="list-style-type: none"> • Soft copy archived on project SharePoint
Project Status Reports	Report the status of the project including activities,	<ul style="list-style-type: none"> • Email 	Monthly	<ul style="list-style-type: none"> • Project Sponsor • Project 	Project Manager	<ul style="list-style-type: none"> • Project Status Report 	<ul style="list-style-type: none"> • Soft copy archived on project SharePoint

1.3.4 Communications Management Approach

The Project Manager will take a proactive role in ensuring effective communications on this project. The communications requirements are documented in the Communications Matrix presented in this document. The Communications Matrix will be used as the guide for what information to communicate, who is to do the communicating, when to communicate it and to whom to communicate.

As with most project plans, updates or changes may be required as the project progresses or changes are approved. Changes or updates may be required due to changes in personnel, scope, budget, or other reasons. Additionally, updates may be required as the project matures and additional requirements are needed. The project manager is responsible for managing all proposed and approved changes to the communications management plan. Once the change is approved, the project manager will update the plan and supporting documentation and will distribute the updates to the project team and all stakeholders. This methodology is consistent with the project's Change Management Plan and ensures that all project stakeholders remain aware and informed of any changes to communications management.

1.3.5 Communication Methods and Technologies

As an organization, we use SharePoint/OneNote as a standard platform from which to share information and communicate.

We will utilize Outlook/OneNote meeting notes feature for capturing meeting agenda and meeting minutes. Additionally, any slides presented will use the standard

slideshow template, available as the default template in PowerPoint or in the Corporate Identity Resource Center.

Informal project communications should be professional and effective but there is no standard template or format that must be used.

Career Expo maintains a SharePoint platform which is connected to OneNote, which will be used to provide updates, archive various reports, and conduct project communications. This platform enables senior management, as well as stakeholders with compatible technology, to access project data and communications at any point in time. SharePoint also provides the ability for stakeholders and project team members to collaborate on project work and communication.

1.3.6 Guidelines for Meetings

As a part of the communications strategy, regular meetings will be held with the team. The following guidelines should seek to maximum productivity during meeting times and decision making.

Meeting Agenda

Meeting Agenda will be distributed 5 business days in advance of the meeting. The Agenda should identify the presenter for each topic along with a time limit for that topic. The first item in the agenda should be a review of action items from the previous meeting.

Meeting Minutes

Meeting minutes will be distributed within 2 business days following the meeting. Meeting minutes will include the status of all items from the agenda along with new action items and the Parking Lot list.

Action Items

Action Items are recorded in both the meeting agenda and minutes. Action items will include both the action item along with the owner of the action item. Meetings will start with a review of the status of all action items from previous meetings and end with a review of all new action items resulting from the meeting. The review of the new action items will include identifying the owner for each action item.

Meeting Chair Person

The Chair Person is responsible for distributing the meeting agenda, facilitating the meeting and distributing the meeting minutes. The Chair Person will ensure that the meeting starts and ends on time and that all presenters adhere to their allocated time frames.

Note Taker

The Note Taker is responsible for documenting the status of all meeting items, maintaining a Parking Lot item list and taking notes of anything else of importance during the meeting. The Note Taker will give a copy of their notes to the Chair Person at the end of the meeting as the Chair Person will use the notes to create the Meeting Minutes.

Time Keeper

The Time Keeper is responsible for helping the facilitator adhere to the time limits set in the meeting agenda. The Time Keeper will let the presenter know when they are approaching the end of their allocated time. Typically a quick hand signal to the presenter indicating how many minutes remain for the topic is sufficient.

Parking Lot

The Parking Lot is a tool used by the facilitator to record and defer items which aren't on the meeting agenda; however, merit further discussion at a later time or through another forum.

A parking lot record should identify an owner for the item as that person will be responsible for ensuring follow-up. The Parking Lot list is to be included in the meeting minutes.

Communication Flowchart

To continue seeking productivity of the team and decision making, this communication flowchart (sample shown below) was created to aid in project communication. This flowchart provides a framework for the project team to follow for this project. However, there may be occasions or situations which fall outside of the communication flowchart where additional clarification is necessary. In these situations, the Project Manager is responsible for discussing the communication with the Project Sponsor and making a determination on how to proceed.

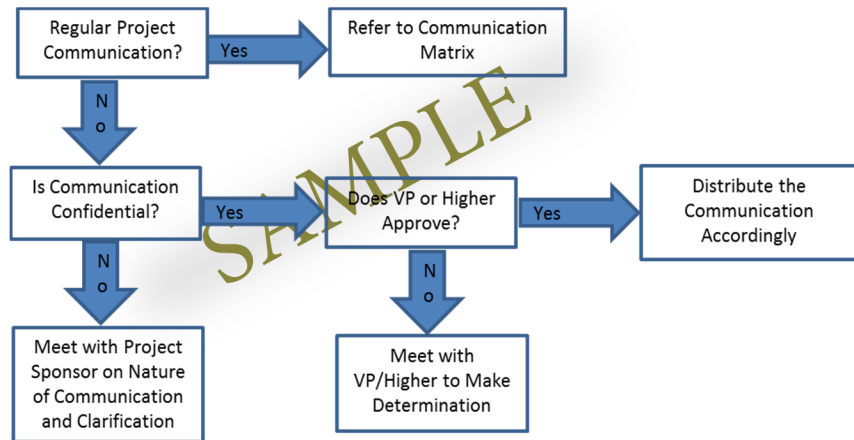
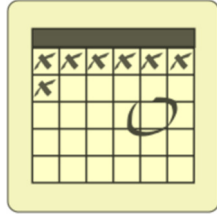


Fig 1.3-1: Communication Flowchart

2. Project Planning



January - March

(3 – 6 Months from approximate event date, usually in July)

Duration Expectation: 3 Months | Complete by: End of March

2.4 Planning Meeting

2.4.1 Assess current business state/objectives

Each event should relate to the current state of the business. Revisit often the original driving focus group studies and also comments from the prior year survey to serve as guides.

2.4.2 Brainstorm new execution theme's/idea's

Be intentional and thorough in this stage! It is frequently the element most skipped or most truncated part of the process. Just as every professional development conference has a theme, this should be no different. As we continue to grow and evolve as an organization, so must the vision and theme of the career expo's. Use the widely talented and creative network employed here, along with the lessons learned to come up with new ways to produce this event. Use the prior event survey comments to fuel discussion, they have a lot of clever suggestions for future improvements.

2.4.3 Select new vision, theme and goals

When the ideas from brainstorming are flushed out, group the ideas. Through this process the intent is to begin developing a specific event vision, theme and

goal. Think outside the box, do not be hampered by prior designs, choose to be inspired. Prioritize or rank the ideas to narrow everything down. Final selections may need approval from the Director of Global Talent Development (GTD). The VP of HR may need to approve, also, but the Director of GTD can decide if it is necessary.

2.4.4 Identify Stakeholders

Identifying stakeholders is important to ensure that major stakeholders are involved at the right time. Below is a sample of what should be completed. Categories could be modified if it's necessary. Consider all Vice President's, Directors, and major POC's for each function and product line that will need to be kept in the communication chain. Specifically, if planning to ask Vice Presidents or Directors to participate in the event in some capacity. This meeting should yield ideas that will guide all of the following efforts. Take the time to get this right so there is a solid foundation to build on.



Stakeholder (Name and Position)	Influence (?)			Involvement (?)			Interest and Commitment (?)		
	Low	Med	High	Low	Med	High	Low	Med	High

In the above chart, consider if the stakeholder has influence on the process, decisions and actions (i.e. Maura Legal will exert influence for this event). Involvement would indicate the stakeholder will be involved in the process. Those that have an interest and

commitment may be a more general description of attendees.

2.5 Project Business Plan

2.5.1 Specify project requirements



Based on the vision, what do you expect that you will need to execute? Specifically, consider:

- what you intend to display
- what space is required
- how you will display booths
- the event timing

Include any intended Vice President events (i.e. Lunch and Learns, Mentoring, etc.), as dictated by the themes.

2.5.2 Specify project estimates

Review prior budget documents and in consideration of current ideas, make it clear how much money is needed to execute the event. Important considerations are all of the direct headcount that it will take to execute. It's an enormous amount of the budget. **See also: 6 Budget Overview**

2.6 Stakeholder Presentations

Depending on the scope of the event, different levels of presentations may need to be prepared. Examples of types are below:

- Present Business Case to VP of Human Resources, Angel Romero the scope of the career expo, since he is an executive level sponsor and approves the budget for this event.
- Present to all applicable functional/product line point of contacts (i.e. department managers and

points of contact from prior year's event) the scope and timeline, expectations, and needs assessments.

- Present to various other sub-groups independently (Learning Council's, Leadership Team) to seek buy-in, resources, or inform on the scope of the career expo.



[Presentations Folder](http://ecs.com/sites/GTD/careerexpo/default.aspx) (Active Link) **Navigation:**

<http://ecs.com/sites/GTD/careerexpo/default.aspx> →

Documents → Presentations

2.7 Facilities

As mentioned in the **Identify potential dates** section, it's important to reserve the facilities quickly. Include Marcy Pile or the building admin on the planning stages that include building layout, timing, furniture, space, flow, or other logistics involving building location.

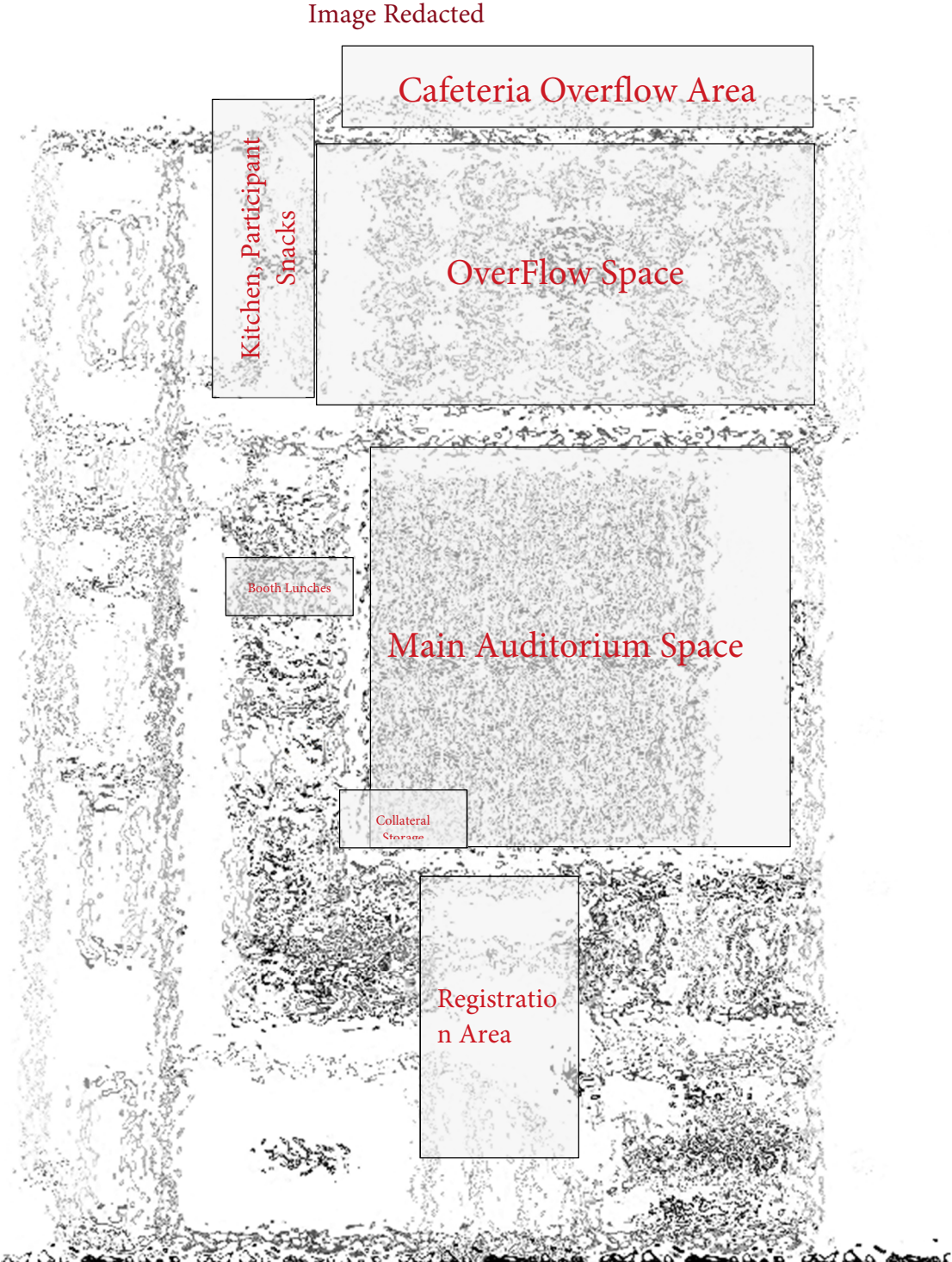


We have always used the auditorium building shown (Fig 2.8-1: Aerial View) on site. Most commonly used is the auditorium, overflow, and the Cafeteria Stage area. In 2017, we utilized every conference room space including the kitchenette area off of the conference area.

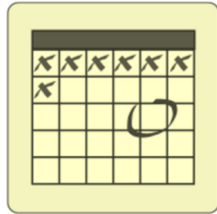
2.8 Action Items

Based on the scope, develop major action items. Action items should include many of the topics in the handbook, but also include smaller logistics such as food and water for the booth participants, snacks or treats (i.e. Eege's) for participants.

Fig 2.8-1: Aerial View



3. Project Preparations



April - June

(1 – 3 Months from approximate event date,
usually in July)

Duration Expectation: 3 Months | Complete by:
End of June

This handbook offers high-level insight into some of the common event areas, however the scope of the event creates additional areas that need to be addressed.

The event is typically held in July to include the interns, which are a specific target audience of this event. How long the event is on and the day(s) you select, is for the career expo team to decide during the design phase. This section will highlight key departments and areas that are critical to preparing for the event execution.

3.1 Media Solutions

Media Solutions, as part of the Business Services group, an in-house resource for creative services. Media Solutions provides a team of creative professionals who are well versed in our branding requirements. They offer all design, signage, photography, video and basic print services. They are expensive and for most items, they are the sole vendor. Using outside vendors can expose compliance issues. Below are the links to their services and the request process.



[Service Request System](#) **Navigation:**

<http://home.com/> → Media Solutions (Quick Links, Left-Side Navigation) → Service Request System



[Price Planning Guide](#) (Active Link)

Navigation: Media Solutions (Quick Links, Left-Side Navigation) → Service Request System → GBS-AM Price Planning Guide

[Service Request User Guide](#)



Navigation: Media Solutions (Quick Links, Left-Side Navigation) → Service Request System → Service Request System User Guide PDF



Expect this to be about 50% of the budget. Media Solutions creates all posters for the event, all fliers, brochures, and photography services for the day of the event. Contact has been Joe Smith, graphic designer. Jobs are assigned by a “router”, if you request Ivan he can assist easier and he will also give you guidance on timing for graphics due dates.

3.2 Booth Participation

Send out a solicitation to all function point of contacts. The goal is to find out which Functions, centers and departments want to participate. Seek to determine what furniture, space, equipment and power participants will need. Specify clear deadlines for submission, goal is 100% participation from all functions and product lines. Encourage like areas to join together in presentation, to eliminate excess single booths for multiple departments within a functional area.

Under the Financial Management section, there are details regarding financial responsibility for requested items.



An Excel document has been used as a data repository for booth participation and requirements. It is encouraged to develop a different technological collection method. SurveySmart or a Sharepoint form submission process to collect the details needed would remove some of the manual collection of data.

Also, set a date for getting request returned and make it a firm date. Send out frequent reminders and then close it down for new entries. Allowing open sign up beyond the cutoff compromises layout designs and causes space challenges, which is clear in the survey reviews.

Consider limiting space. Last year, the space was crowded and participants had a negative experience trying to flow through the event.



Booth Participation (Active Link) **Navigation:** <http://ecs.com/sites/GTD/careerexpo/default.aspx> → Documents → Booth Participation

3.3 Event Equipment

Event equipment can include laptop's, monitor's (large, small, touch, non-touch, stands, no stands), specific power requirements for self-supplied technology (i.e. 3D printers), and miscellaneous items like power surge protectors. From the booth participation submissions, collect equipment and power requirements. Then solicit bids from audio visual vendors. To accomplish this, work with Media Solutions or Marcy Pile, Building Admin.

Depending on what technology equipment the participants requested will affect where their booth can be placed, since power locations are restrictive.

In addition to the inside event technology, laptops are needed for registration. Kevin Handler, IT Manager was the point of contact for these. Spare wired mice and keyboards from the supply center, Building A. Both can be returned when the event is over, or they can be stored at Building PV.

See also: Technology Rental - \$8,000 and Furniture Rental - \$3,000



Every year for audio visual solutions, we have used Q Technologies. Shawn, the owner, is the contact: 520-

555-5555. Information can be found in the financial management section for the costs of items. Further, partner with Media Solutions as they have an open Purchase Order with Shawn. This makes the actual contract easy to execute. Shawn travels quite a bit during the summer, be sure to schedule him early so he's available. Marcy or Media Solutions can give you more resources. Do not be afraid to ask for bids. Shawn is an approved contractor and can be on site without an escort. If you find a better price point elsewhere it may be worth it to sacrifice the convenience.

3.4 Collateral

Most expo like events offer some type of door prize to encourage attendance and in appreciation of the attendees. Decide if you will offer things that support the theme or vision. It's best if the items are usable and meaningful.



In the past, giveaways and trinkets for the door prize giveaways have been ordered and given at the door after registration. Previously, enough was ordered to cover all attendees, there is an option to do less and it would become: first come, first serve.

Usually the GTD Learning department has excess Leadership Development books that is used as part of the giveaways for the door. Typical orders include bags, small trinkets.

(See Staples Promotional Catalog "<http://www.staplespromotionalproducts.com/>"). The storage area is located at Building PV.

3.5 MeetingSmart



MeetingSmart allows planning, sourcing and managing of the event. It consolidates the event information (e.g. attendee management, hotels, event locations, calendars, spending, etc.). It also offers reporting

capabilities that enable access to real-time participation intent. The company requires that events have approval prior and this is done through MeetingSmart. Aside from approvals, MeetingSmart will assist in sending out notifications of the event, reminders, and it may offer the capability to get the booth participants captured in here, as well.

In order to begin the process, certification as a meeting event specialist is required. This is a separate qualification from SurveySmart access and a different process. The link below has all the details explaining how to become certified. Allow time for the team member assigned to this task to read through the provided resources and guidelines for event planning.



[MeetingSmart Notes](#) Navigation:
<http://ecs.com/sites/GTD/careerexpo/default.aspx> →
Notebook → A Blog → Meeting Smart Tab

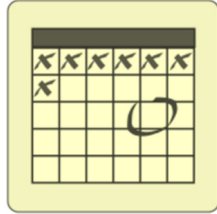


MeetingSmart is not user-friendly and takes time to understand how to use it for the desired options. Hamel Shell, CMM, CGMP, Event Planning Manager is the point of contact.

Request a directory services export from Monica Rouge or Frank Smith in HRIS to send out the notifications and reminders. More details are available in the link above.

The resulting list should also be trimmed to those expected to attend the local event, so narrowing by work location is preferred for the MeetingSmart invitations. For more see section 4.7.1 Employee List.

4. Project Execution



June - July

End of June – July to day of event

Duration Expectation: Weeks | Completion is the event

4.1 Volunteers



For the execution of the event, recruit surge members to work on the team. These are volunteers that agree to work the day of the event. Most of the HR organization should be recruited for a shift or multiple shifts. Have core members reach out to contacts to get volunteers. Volunteer totals will be dependent on the activities and event specific needs. As a guideline, expect to need approximately (20) at all times:

- (6) **Registration personnel** – they work the entire event, either the participant or volunteer areas
- (2) **Food runners** – stock booth participant kitchen and monitor participant offerings
- (1) **Prize booth** (if applicable) – validating any day of contest submission and giving prizes
- (2) **Entry greeters** – they give out door prizes as they enter the event. This can be given to the registration desk personnel if you have enough stations that it doesn't cause a back log.
- (3) **Main entrance greeters** – they stand at the main entry doors to welcome and guide participants to either registration desk
- (4) **Floater**s – to give breaks to volunteers
- (2) **VIP hosts** – trusted volunteers that will interact with VP speakers, keep event on task and moving.



Each execution of the expo has failed to properly account for volunteers, duties and provide preparation training. In doing so, the day of execution becomes more frantic than it otherwise would. Suggestion is to account for this in the execution tasks.

4.2 Registration Tool

The registration software for the event was developed in 2017. It is an electronic logging of participants as part of the check-in process. It automatically registers the time in addition to their ID and PeopleSoft name. It is important to utilize this to verify attendance counts and the peak participation times. It helps to do the closeout report. There is some work that will go into updating the software for use the day of the expo. Below are the get the tool ready for use.



[Registration Tool](#) Navigation:

<http://ecs.com/sites/GTD/careerexpo/default.aspx> →

Documents → Resource Management_Tracking, Actions, Attendance, Invites, Master → Registration Tool REVISED 10.18

Employee List

Section 3.6 MeetingSmart discussed getting an export of directory services or an employee list. This is necessary to use for both the MeetingSmart invite/notification process, but also for the registration list. For registration purposes, the employee list must be modified, depending on the regulation and the designations that are applicable based on the intended displays. Alter the list to exclude certain contractors and other such employees.

For the registration tool purposes, leave the all employees since they may be in town on travel and decide to attend.

Loading the List

Once the list is trimmed, load the list into the Headcount List tab in the registration excel workbook. The day before registration, load this tool onto the laptop with via USB drive. The same drive will be used to extract the revised documents at the end.

Registration Tool Enhancements

This was created with the help of Jeff Shine. A few enhancements that should be considered for 2018:

- 1) Auto save after every entry, in case the computer shuts down, data is not lost if the registration desk fails to manually save frequently.
- 2) Reconfigure to not allow blank entries in the Employee ID field.

4.3 Logistics

Create a solid agenda for the day of the event. This section cannot account for specific day-of logistics. This is a highlight of expected items to be mindful of during execution.

4.4 Day before logistics

Compile, organize giveaways, collateral

Prep items from 4.5 Collateral, expect over 1,000 door prizes to be prepped. Prep as much as possible in the days prior to the event. Use the phone area in the event building for storage of the items. Confirm with the admin the facility access availability and schedule accordingly.

Set up registration areas

Registration areas should be divided, booth participants and volunteers to register in a separate area. Main participant registration area should have at least four (4) volunteers; volunteer/booth participant registration area should have at least two (2). Verify you have power established, know the password, or have them set to never sleep. Registration tool should be loaded onto each system via USB drive.

Verify vendor set ups

Verify that each booth has all requested items. Verify no cords are running across the floor without being taped down. You may want to enlist an EHSS representative to check all areas to be sure everything is safe.

4.5 Day of logistics

Event volunteers

Check on all volunteers throughout. Verify volunteers are getting breaks to eat. Since this event typically occurs during lunch, many will not have eaten.

Event check in

Check on the various speakers and/or events to be sure they are successful. Assist with any preparations.

Clean up

Tasks include:

- Returning borrowed furniture
- Rented furniture/items should be placed in one location for pickup/removal by vendor
- Flatten all boxes and take them to the recycle area

- Take all orphaned property back to the building PV storage area until owner can be located for pick up
- Remove all other trash/debris

Registration Tool Use

Check in can be completed by participants or registration desk personnel. In letting the user perform this entry is typically faster, but could result with more errors.

Fig 4.5-1: Self Registration Entry

The screenshot shows a self-registration interface. At the top is a red bar with the text "SELF-REGISTRATION". Below this are three input fields. The first is labeled "Enter Employee ID" and is empty. The second is labeled "Name" and contains the text "No Match Found". The third is a button labeled "Enter".

To check in:

- 1) **Select** the *User Interface* tab in the section labeled as Headcount List Checker.
- 2) **Type** in the employee's PeopleSoft ID.
- 3) **Enter**.
 - a. If a match is found, their name will show under Closest Name Match.
- 4) **Select** the button labeled "*Add Current Employee Id and Name to Expo Attendance List.*" The name is automatically added to the *Expo Attendance List* tab. This list is how you will check your attendance at the end of the event.

In the event that an employee does not display, check their badge and have them use the manual entry right below the self-registration input area.

Fig 4.5-2: Manual Registration Entry

The screenshot shows a manual registration entry interface. It has a title "Manual Entry" at the top. Below the title are two input fields: "Employee ID" and "Name (First Middle Last)". Below these fields is a button labeled "Add Current Employee ID and Name to Expo Attendance List". Yellow arrows point from the input fields to the button.

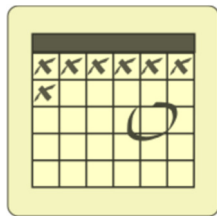
To run this software, be sure **all macros** are enabled to run through the Trust Settings. File → Options → Trust Center → Trust Center Settings → Macro Settings → “Enable all macros”

***NOTE:** Verify that the computer times have been set if this operating on loaner systems. Otherwise, your headcount time stamp will not work.*

After Actions

At the end of the expo, extract the tools via a USB drive for compilation. Then compile into one document. Verify there were no blanks entries and verify all manual entries. Then analyze to get headcount and other meaningful participation statistics.

5. Project Closeout



July - Oct

Duration Expectation: Varies

Closing out the project will take some time, but the length will vary depending on the scope of the expo. These elements will run consistent and should be performed as quickly as possible following the end of the event. This will be complete when the budget is finally completed after all transactions have appeared on the financial profit/loss statements from Finance.

5.1 After Actions

If the event offered specific shadowing opportunities, lunch with leadership, or other mentoring

opportunities, there are significant planning steps that need to occur.

As an example, if the event offered a Lunch with Leadership opportunity, it is imperative to begin coordination with the Executive Admin's for each Vice President to secure time on their calendar, conference rooms, etc. Notify the winners and coordinate food delivery.



Historically, shadowing and lunch with leadership were offered. Events need to be scheduled quickly if intending to include Intern's before they leave in August. Challenges include participant invitation management and coordinating with the admin's on availability and food.

If you host an event where Maura Legal, Vice President is participating, beverage preference is Coke Zero.



Shadowing and Lunch with Leadership Navigation:
<http://ecs.com/sites/GTD/careerexpo/default.aspx> → Documents
→ After Actions_Survey's, Awards, Etc →
Shadowing_LNL Documents

5.2 Hold Closeout Meeting

Gather the team together within one week of the expo. Best if done as an in-person meeting. The following areas should be discussed and documented.

Prepare lessons learned

The team should share their collective feedback and experiences in the execution of the event. Share what was good, needs improvement and what should be done in the future. These are critical for continuous event execution evolution and improvement. Sharing during this time is not defensive, blaming or otherwise derogatory. It should be an open and honest discussion in the spirit of quality improvement.

Prepare survey

Use should use [SurveySmart](http://web.com/functions/comms/surveysmart/) to create the follow up survey. <http://web.com/functions/comms/surveysmart/>

Prior surveys should be altered as needed to fit the event but align well enough to foster continuous event analytics.

5.3 Award Project Team

Prepare Awards recognition for core team members and other critical personnel involved in the execution of the event. For prior award valuations, please see the Director of Global Talent Development or the Learning Manager in Global Talent Development.

Further, a full roster of HR volunteers and other strongly participative surge members should be compiled for presentation to Angel Romero for a thank you letter.

5.4 Prepare Closeout Report

Prepare a write up of the event in summary for advertisement in the employee communication newsletter. This summary will also be given to the Director of Global Talent Development.

5.5 Prepare Budget Final Report

The budget report is the last element. It may take as long as October to get the final numbers submitted through the financial Statements. Also see section: Final budget report.

6. Financial Management

The budget for this event is set by Angel Romero, Vice President of Human Resources and Security, delivered through Global Talent Development's cost center. Mark Kale is currently the financial analyst contact.

The budget is typically \$33,000. This encompasses the budgets for the Arizona and Texas events. The team typically spends 75% on the Arizona event and 25% on the Texas event. (The Texas event is shared by SAS) The Arizona project lead is accountable for staying on track. Establishing a number for Arizona, will cascade remaining dollars for the other events. Texas is self-managing. Once the Arizona budget is set, the remaining is given to Texas. The on-ground leads on the Texas team will manage it.



[Financial Management](#) (Active Link) **Navigation:**

<http://ecs.com/sites/GTD/careerexpo/default.aspx> → Documents
→ Financial Management

6.1 Budget Overview

The budget overview is Arizona, only.

Direct Headcount - \$11,000

Direct headcount time is billed to the team if a direct headcount employee “volunteers”. Agreeing to “pay” for a volunteer typically only applies to the Core team. Can also be done for critical day of surge members. Expect annually 200 hours @ approximately \$55/hour.

Technology Rental - \$8,000

Try to secure technology in house (loaner equipment). If unavailable, typically, the requesting booth participant is responsible for the charge and it gets coded to their cost center, unless otherwise agreed upon.



In 2017, the expo required specific technology for demonstrations that we required. Therefore, this cost was paid for by the expo's budget dollars.

Furniture Rental - \$3,000

Most of the execution furniture is available at the event facility. Each year an inventory is assessed and then participants are restricted to the available inventory.



In 2017, we added additional pipe/drape to section off the auditorium, rented tall round tables and additional easels. The easels (we needed 75 last year) can be purchased cheaper than renting if done in advance. They are used annually and so it would make sense to purchase vs. rent.

Collateral - \$ Variable Valuation

Annually, shirts are purchased for the core team members to wear on the day of the event. Seek the most cost effective options. The cost shouldn't exceed \$300.

In addition, if the team chooses to purchase door prize type items, such as personal notebooks, branded pens, or event tote bags, purchase of these items is discretionary and there is no set valuation.

Media Solutions - \$ Variable Valuation

Media Solutions design, production and services should come out of the Career Expo budget **only** for

collateral, design and printing of items for the advertising and day of execution elements.

If a booth participant requests the large poster will acrylic holders to be created or modified, those expenses will be covered by the requestor. Secure their cost center to use during the submission process, or have them directly submit the request to Media Solutions.

It is important to code items properly when submitting work through Media Solutions. If item requested is for a specific display booth, it comes from their budget.



Historically, this portion has been right at 50% of the target budget for the event.

Final budget report

Due to the accounting process flow, the final budget report will not be able to be compiled for about three months after the expo has concluded. Prepare the final report for the benefit of the next lead as a comparative for the cost considerations.

7. Finished

Congratulations! You successfully finished with the Career Expo, for this year, at least. The most important thing is to celebrate the achievements and prepare for the next team to take over. Update this document so they can benefit from this year's decisions. The nicest thing you can do, is leave this nicer than when you found it!



Appendix A: Team Charter

1. Team Purpose

Career Expo team is a cross-functional year-round event team, hosting quarterly events that seek to empower employees to:

- Plan their careers
- Expand their network of mentors, advisors and colleagues
- Take advantage of career development resources
- Learn about strategic skills
- Understand the technical and leadership career paths

Surge event planning team focuses on the Career Expo's located in Arizona (July) and Texas (July/Aug).

2. Team Ground Rules

- ❖ Be on time to meetings
- ❖ Agenda and Meeting minutes communicated as soon as available
- ❖ Submit deliverables, updates to the team site
- ❖ Exhibit patience with alternative viewpoints, different learning styles, etc.
- ❖ Decisions should have a majority consensus and in the event of a stalemate, the project lead will decide
- ❖ Project Coach and Project Sponsor have veto and influence to the team
- ❖ Inform if unable to complete task on time, as soon as it's evident
- ❖ Take initiatives by offering ideas and volunteering for tasks



3. Duration and Time Commitment

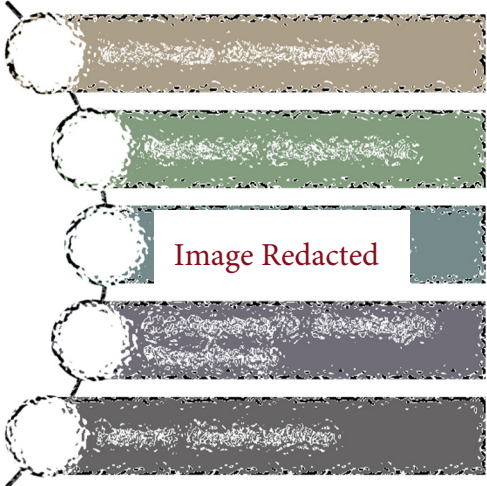
Full-time members expect at least a two-year commitment to the team.

Surge teams expect to be together from March – October, core team is expected to be available year around for the non-expo events held each quarter. Participation includes attending team meetings for updates and alignments, virtually or in person.

Project leads will be selected to run the team for one year and then participate in year two in a transition capacity. Following that commitment, they can then opt out of the planning team, or could stay if bandwidth and department approval exists.

4. Scope

This team’s focus is on development for all, leveraging Global Talent Development’s framework. All events hosted as a part of the Career Expo team are focused around the original tenets created by the founding members.



5. Members

Core Team (CT) Members (2017)

ROLES	INCUMBENTS
Project Coach	
Project Lead	
Former CT: Project Lead (Transition Role)	
Former CT: Project Lead (Consulting Role)	
CT Member	
CT Member	
CT Member (NTX)	
CT Member (POC)	

Surge Team (ST) Members (2018)

ROLES	INCUMBENTS

Alternate Team (AT) Members (2018)

ROLES	INCUMBENTS

6. Supporting Resources

The supporting resources almost always include other people that were not assigned as team members but still add value toward the overall purpose. Other resources are dependent on the team activities (blue prints, meeting rooms, travel budgets, corporate authority, software, etc.)

Person	Supportive Role	Actions/Areas of Resource	Contact Information

7. Deliverables (KPI's)

Under budget \$33,000 for Texas and Arizona

On time, no delay kickoff

Links – This section considers other departments or organizational initiatives that may have overlap with the group’s purpose. It could also include key resources that are known Subject Matter Experts (SMEs) in specific fields.

Desired End Result – This provides an opportunity to begin with the end in mind. This is where the sponsor can establish goals for the team to achieve. The goals need to be clearly defined. By defining the desired end result, the magnitude of the change becomes evident.

8. Roles Descriptions

Project Sponsor – Director GTD and/or Vice President of HR

- ❖ Protects the project from external influences
- ❖ Provides funding
- ❖ Approved the charter and PM Plan
- ❖ Sets priorities between projects
- ❖ Identified Project Manager and authority level
- ❖ Approves or rejects changes
- ❖ Formally accepts deliverables or product of project

Program Coach – Manager of GTD Learning or as appointed

- ❖ Drives from behind to ensure success of the program
- ❖ Offers guidance to the project manager
- ❖ Functions in an oversight capacity to ensure each project contributes to the overall benefit of the program

Project Lead – As appointed

- ❖ Is responsible for all aspects of the project:
- ❖ Project management planning
- ❖ Communications to stakeholders
- ❖ Change management planning
- ❖ Creating all needed management plans (scope, time, budget, quality, communications, HR, risk and procurement)
- ❖ Using metrics to measure project progress and implement changes or corrections when needed
- ❖ Proactively addressing potential problems
- ❖ Possesses the authority to accomplish the work of the project
- ❖ Resolves variance to the project management plan with the team
- ❖ Regularly and proactively addressing project risks with the team
- ❖ Ultimately responsible for project success or failure

Core Team Member – As appointed or volunteered

- ❖ Participates in all planning and execution phases of all Career Expo events on a continuous basis
- ❖ Remains on the team for a minimum of a two-year rotation, with a planned roll-off
- ❖ Completes actions related to planning and execution of events within agreed time frame, or communicates early if a delay or issue to get assistance
- ❖ Brings creative thoughts and ideas to achieve goals annually, with continuous improvement in mind
- ❖ Trains replacement prior to exit
- ❖ Provides frequent updates on action items and uses the team site

9. Team Collaboration Site

The team will use a Sharepoint team collaboration site:

<http://ecs.com/sites/GTD/careerexpo/default.aspx>

This site contains the following elements:

Notebook (connected through One Note)

Used for all meeting notes, agendas and other collaborative note taking/reporting opportunities.

Documents

All documents can be uploaded into the appropriate folders for storage and reference by the team now and in the future.

Calendar

Important milestones or events can be added to the calendar for quick reference.

Project Issue Tracker

To note issues with a project action that needs to be resolved by the team, project lead or project sponsor.

Project Tasks

A listing of all action items in the process of event planning for full expo's as well as ancillary events that surround the expo events.

Contact List

Of all team members (TBA)

Appendix B: OneNote/Outlook Correlation

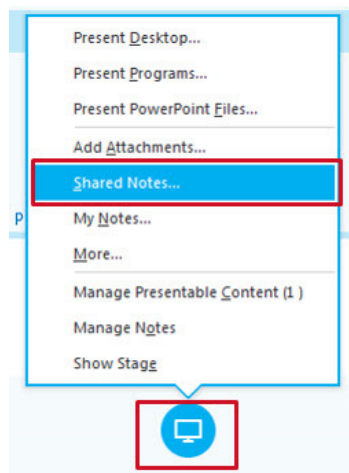
Have you ever wondered if there's an easier way to take meeting notes? Try using: **OneNote**.

OneNote is a dynamic, integrated Microsoft tool already available on your computer. You can use it to start capturing your ideas and to-do lists in one place. To open your personal copy of OneNote, go to your **Start menu** and **search** for "OneNote" to open it. (If you cannot find it, you can download it from the app store.)

Click here for step-by-step instructions on how to set up OneNote.

For those who have started using OneNote, did you know there is a quick and easy way to take attendance with OneNote?

1. In your meeting invitation, click the **Present Desktop** icon > **My Notes**.



2. Click the **OneNote notebook** and **section** you want to take your notes in and click OK.



3. A new page will automatically open in OneNote, with the **title** as the **meeting name**.

4. The attendees in the meeting will automatically be added to this page. A checkmark will be automatically added next to each attendee.



Learn more about OneNote and the many time-saving features it contains. We will continue to highlight features of OneNote in our weekly Quick Tips.

Bookmark this page to find and search the latest tips now available within the Collaboration Learning, Education and Resources Center.

Click [here](#) for more information and helpful resources on our new suite of collaboration tools including: Outlook, Chat, and

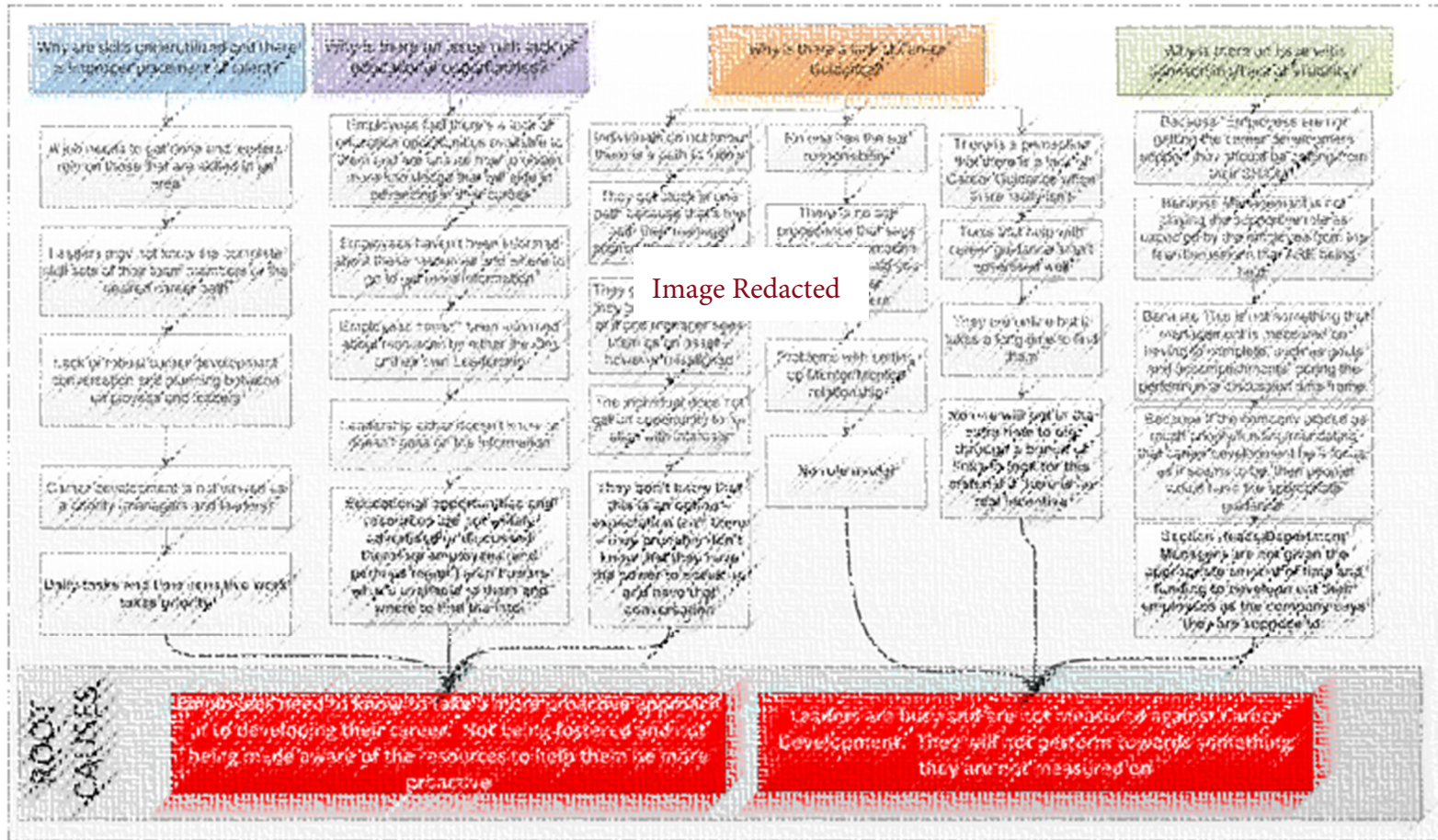
Career Expo Project Handbook Appendix B: OneNote/Outlook
Correlation
Sharepoint in the Collaboration Learning, Education and
Resources Center.

Still have questions? The team is now holding **biweekly
office hours** to assist with any related questions, more
information can be found here.

Appendix C: Original Focus Group Feedback Summary



Appendix D: Focus Group Root Cause Analysis



Appendix E: Focus Group Recommendations

Recommendation	Target Audience	Next Steps
Hold annual career events sponsored by functional leaders	<ul style="list-style-type: none"> Increased awareness regarding roles, opportunities, and career development resources Expanded network Functional leaders support the events, communicate and encourage employees to attend 	<ul style="list-style-type: none"> Explore a partnership between the ERGs and functional leadership to sponsor and communicate events Create business case to present to Engineering Talent Council
Increase emphasis on employee development plans during PD cycle	<ul style="list-style-type: none"> Employees and leaders are aware of their role and responsibilities Employees initiate the career conversation, seek feedback, and create & manage the development plan Leaders guide and support employees and provide ongoing feedback Development planning is embedded in a structural process (PD cycle), ensuring career conversations take place and development plans are sustained 	<ul style="list-style-type: none"> Benchmark (industry and other business units) Leverage Enterprise effort to update career development messaging to reflect changing industry and employee views Explore mandating development plans as a pilot in Engineering Assess the resources needed to support this effort Create a change management plan
Improve leader effectiveness in supporting employee career development, integrating resource leadership development programs and the Leadership Brand efforts	<ul style="list-style-type: none"> Increased leader awareness of tools, resources and best practices Ownership and accountability of leader's role Embedded development conversations in daily activities (e.g., 1:1 meetings, project status meetings) Long-term goal: have employees rate leader performance in this area 	<ul style="list-style-type: none"> Benchmark Partner with the Leadership Brand team and CEO to integrate career development resources Expand the process, materials and resources provided by leaders of high-potentials Ensure career development expectations are communicated to new leaders

Image Redacted