



**Positive Risk:  
How SMART WOMEN Use Their Passion to Break Through Their Fears**

**Developed by Barbara Stoker**

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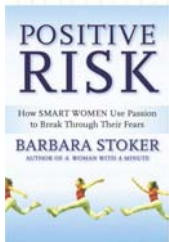
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## Program in a Box: Positive Risk

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**Presenter Qualifications:** presenter must be an approved Certified Program Facilitator.



*Positive Risk: How SMART WOMEN Use Their Passion to Break Through Their Fears*

**A workshop created to address the reality that women are natural born leaders.**

This program is developed from the cutting edge material of bestselling author Barbara Stoker's latest book, *Positive Risk: How Smart Women Use Passion to Break Through Their Fears*.

This dynamic, interactive and fun workshop will help you answer the following questions:

- Are you risking up to your ability?
- Do you give yourself enough credit?
- Is your passion greater than your fear?
- What is your Courage Ration?
- How do you define success?
- What invisible risks are you taking?
- Whose mountain are you climbing?

### Program Outcomes and Benefits

During this program, you will step beyond theory becoming actively involved and focused on the mountains you are tackling in your own life. You will explore the risk you face and where you'll find the courage to see it through.

By attending this program, you will:

- Achieve greater professional and personal rewards from your career
- Explore the reality that women are natural born leaders
- Build on your existing skills, talents, and strengths
- Address the 15 Critical Questions every woman should ask to ensure that she is taking the right risks in the smartest way possible.

Positive Risk is a groundbreaking workshop that will provide practical advice you can apply the very next day at work.



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### I. Pre-Planning

**Timeline: 3 to 6 months prior to date**

NOTE: If you are selling the workshop to a for-profit organization, please contact the FWI Association Office for specific instructions.

- A. Review materials on website about programs – FWI Programs – Workshops
- B. Determine purpose for workshop
  - Member Recruitment
  - Visibility in Community
- C. Identify market and/or target audience
- D. Determine type of program (Positive Risk is designed for 4 hours)
  - If part of District Conference – when (before, during or after)
  - Stand alone morning workshop followed by lunch
  - Stand alone lunch followed by afternoon workshop
  - Stand alone afternoon workshop followed by reception
  - Stand alone evening workshop including a meal
- E. Decide if sponsorships are desired
  - If yes, develop contact list
  - Create solicitation letter (example included)
- F. Create budget (example included)



## II. Preparation

**Timeline: within 3 months of date**

- A. Make list of potential dates
- B. Contact the FWI Association office to request a Certified Program Facilitator (CPF)
  - See Members Only section on website to view a list of CPFs (on left)
  - Within two weeks, you will receive the name and contact information of the CPF.
- C. Make meeting room arrangements
  - Room setup
  - Food and refreshments
  - Audiovisual requirements
- D. Inform the FWI Association office of workshop date
  - Call 866-236-2007 or email [info@fwi.org](mailto:info@fwi.org)
- E. Develop mailing list
- F. Produce marketing materials (example included)
- G. Send invitations

**Timeline: suggest 4 weeks prior to date**

- H. Develop press release (example included)
  - Contact newspapers to find out their timelines for submitting press releases



### III. Pre-Workshop Preparation

**Timeline: within 3 weeks of date**

- A. Obtain registrations and fees
  - Suggest closing reservations up to 15 days before date of workshop
- B. Confirm arrangements with meeting location and CPF  
**Timeline: 2 – 3 weeks prior to date**
- C. Notify FWI Association Office of the number of participants and order workshop materials  
**Timeline: 15 days prior to date**
- D. Prepare participant name tags  
**Timeline: 5 days prior to date**
- E. Prepare registration sign-in list
  - If did not get guests contact information during registration, can get here for future follow-up
- F. Contact CPF to finalize travel arrangements
- G. Contact site liaison to review details
  - Room arrangement
  - Meals



#### **IV. Day of the Workshop Preparation**

- A. Meet with CPF prior to workshop to finalize any details
- B. Meet with site liaison to finalize any details
- C. Have display of FWI materials at registration desk
  - New member packets
  - Recent FWI materials or publications
  - Any local group collateral pieces



## V. Workshop Follow-Up

Timeline: up to 2 weeks following date

- A. Send evaluations and payment for participant materials to FWI Association Office
  - Unused materials can be returned
  
- B. Write appropriate thank you notes
  - CPF
  - Sponsors
  - Guests
  
- C. Contact non-member attendees for FWI Membership



## VI. Resource Kit List

The Resource Kit contains:

- Explanation of what is a Certified Program Facilitator and things to consider when inviting them to facilitate your workshop
- Three sample budget formats
- Meeting planning checklist
- A list of audio-visual considerations when planning your workshop
- Two sample workshop notices/invitations
- A sample press release
- A list of things to consider when co-sponsoring an event with another organization



## Certified Program Facilitator (CPF) Information

FWI initiated its Certified Program Facilitator (CPF) program a number of years ago in response to members' requests for more affordable seminars. The CPF program is for women, who, because of their professional experience and their presentation skills, are qualified to lead Paragon Circle Workshops, FWI signature programs.

For list of approved CPFs go to the Members Only section on website – click on Certified Program Facilitator (left side menu). Contact the FWI Association Office at 866-236-2007 or email [info@fwi.org](mailto:info@fwi.org) to request the CPF.

Things to remember about CPFs

- They are dedicated members of FWI
- They are volunteers
- They have real jobs and real families
- Do not expect them to pay anything out of their pocket or have their employer pickup any of the expenses
- Do not assume they are willing to stay at someone's house, be courteous and ask
- Ask if they have any special diet needs or other accommodations



## Sample Budget 1

### EXPENSES:

CPF travel, lodging and meals	\$ _____
Program Materials	\$ _____
Meeting room	\$ _____
Marketing	\$ _____
Audio-Visual equipment	\$ _____
Flipchart	\$ _____
Other materials	\$ _____
Food and refreshments	\$ _____
Other	\$ _____
<b>TOTAL EXPENSES</b>	<b>\$ _____</b>

### INCOME:

Registration (____ # of participants @ \$____)	\$ _____
Sponsorships	
Member Organization	\$ _____
Other	\$ _____
<b>TOTAL INCOME</b>	<b>\$ _____</b>

**NET INCOME/EXPENSE** \$ \_\_\_\_\_



## Sample Budget 2

Budget for *Positive Risk*

### EXPENSES:

Program Materials	Enter # needed _____	
	Cost per Handbook	x \$49
<b>Total Workbook Expense</b>		_____
CPF Expenses	Travel	_____
	Lodging	_____
	Meals	_____
	Misc	_____
<b>Total CPF Expense</b>		_____
Meeting room Expense	Cost of room	_____
	Audio/Visual Expense	_____
	Flip chart/s	_____
	Misc	_____
<b>Total Room/Equipment Expenses</b>		_____
Meal and/or Beverage Expenses	Enter # of participants	_____
	Enter total cost of meal/beverage exp. per participant	_____
<b>Total Meal/Beverage Expenses</b>		_____
Marketing Expenses	Cost of paper for flyer	_____
	Cost of flyer preparation	_____
	Estimated postage expenses	_____
	Misc	_____
<b>Total Marketing Expenses</b>		_____



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Other Expenses	Thank you gift for CPF _____
	Door prizes for participants _____
	Misc _____
<b>Total Other/Misc Expenses</b>	_____

**INCOME:**

Registration	Enter # of attendees _____
	Enter Registration Amount _____

**Total Income from Registration** \_\_\_\_\_

Sponsorships	Sponsor 1 _____
	Sponsor 2 _____
	Sponsor 3 _____
	Sponsor 4 _____

**Total Sponsorships** \_\_\_\_\_

Other Income	Misc _____
	Misc _____

**Total Other Income** \_\_\_\_\_

**TOTAL INCOME** \_\_\_\_\_

**NET INCOME/EXPENSE FOR PROGRAM** \_\_\_\_\_



### Sample Budget 3

(Courtesy of the San Diego County Group and the Golden West District)

Income Item	Amount	Assumptions	
Workshop Fees	\$7,950	\$159@50 Paying Attendees + 6 Comps	2 ProCourier, 3 Celebrating Ldrshp, 1 Fac.
Opportunity Drawing	\$400	40 @ \$10	
Logo Item Sales	N/A		Web Link, 2 Comps, Recognition on Invit.
ProCourier	\$2,000	Event Sponsor	Recognition on Invitations, Infomercial, Name & Logo on PowerPoint
<b>Income</b>	<b>\$10,350</b>		
Expense Item	Amount	Assumptions	
Four Points Sheraton Food	\$2,744	56 @ \$49	<b>B \$10.75, L \$17.00, \$ \$10.65 x 126% = 48.38 (\$49)</b>
Bartender	\$75		
Room	\$150	Incl. Pitchers of Ice Water All Day	Lunch in Separate Room*
10' Screen	\$65		Podium/Judy-Sound
Cordless Lavlier	\$125		
Podium/Mic	\$75		
Riser	\$0		
Event materials	\$2,750	55@\$50 (Less Paragon Circle - 3?)	<b>Mailers</b>
Invitation Stock/Env	\$250	1,500	79 FWI - SD
Fac. - Hotel/Meals	\$250		390 OC
Fac. - Travel	\$400		72 IE
Misc Materials	\$100	1,000	73 BF - SD
Printing	\$200		65 IE
Postage	\$555	1,500	54 OC/LA
Website Promo Costs	\$100		155 CBA
Plaques-Cele. Ldrshp	\$150		66 NAWBO - SD
<b>Direct Costs</b>	<b>\$5,245</b>	<b>Divide by 56 = \$93.66</b>	91 ProCourier
<b>Total Event Cost</b>	<b>\$7,989</b>	<b>\$142.66</b>	180 SD Business Journal
<b>Projected Profit</b>	<b>\$2,361</b>	* \$150 approved by District board for International to fax Group & District Presidents, Surrounding States.	70 SD Super Bowl Vendors
			140 OC Network Group
			1,427 Total
			\$500 Deposit - Hotel - Done
			Julie Cripe - Expenses
			Check-in Time/Basic Program Schedule



## Sample Meeting Planning Checklist:

<b>MEETING PLANNING CHECKLIST</b>		
	<b>Who is Responsible</b>	<b>By When</b>
<b>1. Agenda or Format</b> <input type="checkbox"/> Consider needs of potential attendees <input type="checkbox"/> Develop agenda format <input type="checkbox"/> Copies of agenda/format to group <input type="checkbox"/> Contact people on the agenda/format <input type="checkbox"/> Other	_____ _____ _____ _____ _____	_____ _____ _____ _____ _____
<b>2. Publicity/Promotion/Notifying</b> <input type="checkbox"/> Develop Prospect List <input type="checkbox"/> Develop invitation notice <input type="checkbox"/> Mail invitation/notice with agenda <input type="checkbox"/> Include directions to meeting place <input type="checkbox"/> Phone calls <input type="checkbox"/> News releases <input type="checkbox"/> Personal contacts <input type="checkbox"/> Other	_____ _____ _____ _____ _____ _____ _____ _____	_____ _____ _____ _____ _____ _____ _____ _____
<b>3. Pre-Meeting Responsibilities</b> <input type="checkbox"/> Leadership assignments <input type="checkbox"/> Rehearsal of the meeting/program <input type="checkbox"/> "Hosting" roles <input type="checkbox"/> Testing Equipment <input type="checkbox"/> Other	_____ _____ _____ _____ _____	_____ _____ _____ _____ _____
<b>4. Space/Room Check List</b> <input type="checkbox"/> Size and shape of space <input type="checkbox"/> Electrical outlets <input type="checkbox"/> Mike outlets <input type="checkbox"/> Acoustics <input type="checkbox"/> Thermostat <input type="checkbox"/> Parking facilities <input type="checkbox"/> Location <input type="checkbox"/> Room set up arrangement <input type="checkbox"/> Telephone access <input type="checkbox"/> Exhibit space <input type="checkbox"/> Emotional impact (color, aesthetics) <input type="checkbox"/> Other	_____ _____ _____ _____ _____ _____ _____ _____ _____ _____ _____ _____	_____ _____ _____ _____ _____ _____ _____ _____ _____ _____ _____ _____



Leaders in banking.

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### Sample Meeting Planning Checklist (Cont'd)

5. Equipment for Meeting	Who is Responsible	By When
<input type="checkbox"/> Tables (number, size, shape) <input type="checkbox"/> Chairs (comfort) <input type="checkbox"/> Audio-visual equipment (laptop and projector/screen/vcr/microphones/flip charts, etc.) <input type="checkbox"/> Coffee, tea dispensers <input type="checkbox"/> Other	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
<b>6. Materials and supplies</b> <input type="checkbox"/> Name tags/tent cards <input type="checkbox"/> Pens <input type="checkbox"/> Masking tape <input type="checkbox"/> Scratch paper <input type="checkbox"/> Prospective member kits <input type="checkbox"/> Display material <input type="checkbox"/> Directional signs <input type="checkbox"/> Other	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
<b>7. Budget:</b>  Costs <input type="checkbox"/> Room rental <input type="checkbox"/> Mailing and stamps <input type="checkbox"/> Telephone calls <input type="checkbox"/> Rental of equipment <input type="checkbox"/> Reproduction of material <input type="checkbox"/> Refreshments/dinner <input type="checkbox"/> Other  Income <input type="checkbox"/> Registration fees <input type="checkbox"/> Sale of materials <input type="checkbox"/> Refreshments/dinner <input type="checkbox"/> Other	Estimated Costs  <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> Estimated Income  <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	



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**Sample Meeting Planning Checklist (Cont'd)**

<p><b>8. Immediately Prior to the Meeting Check:</b></p> <p>_____ Seating arrangements          _____ Extra chairs          _____ PA system          _____ A/V          _____ Materials available          _____ Registration setup          _____ Name tags/ tent cards          _____ Refreshments          _____ Thermostat          _____ Other</p>	<p>NOTES</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>
<p><b>9. At the Meeting</b></p> <p>_____ Meeting, greeting, seating          _____ Greeting latecomers          _____ Handing out materials          _____ Operation of equipment          _____ Announcements          _____ Other</p>	<p>NOTES</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>
<p><b>10. End of Meeting – and After</b></p> <p>_____ Collect unused materials          _____ Return equipment          _____ Clean up          _____ Thank helpers          _____ Mail follow-up materials          _____ Remind people of follow-up assignments          (phone/write)          _____ Send follow-up publicity as appropriate          _____ Evaluate meeting effectiveness          _____ Debrief committee          _____ Pay bills          _____ Other</p>	<p>NOTES</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>



## Sample list of possible audiovisual needs

### Materials and Audio-Visual Requirements

- Tables and chairs for all participants (“U” shaped arrangement)
- One table in front of the room for the CPF presenter
- One table in the rear of the room for materials
- One easel with flipchart and markers
- Laptop, projector and screen. (You may use a blank wall up front if available. CPF may have laptop)



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### Sample Meeting Notice:

***POSITIVE RISK: How Smart Women Use Passion to Break Through Their Fears!***

### FINANCIAL WOMENINTERNATIONAL GROUP NAME HERE

### CORDIALLY INVITES YOU TO ATTEND A WORKSHOP CREATED TO ADDRESS THE REALITY THAT WOMEN ARE NATURALLY BORN LEADERS

This program is developed from the cutting edge material of bestselling author Barbara Stoker's latest book, *Positive Risk: How Smart Women Use Passion to Break through Their Fears*.

JOIN OTHER FWI MEMBERS for a dynamic, interactive and fun workshop that will help you answer the following questions: Are you risking up to your ability? Do you give yourself enough credit? Is your passion greater than your fear? What is your Courage Ratio? How do you define success? What invisible risks are you taking? Whose mountain are you climbing?

**PROGRAM OUTCOMES AND BENEFITS** During this program, you will step beyond theory becoming actively involved and focused on the mountains you are tackling in your own life. You will explore the risk you face and where you'll find the courage to see it through.

By attending this program, you will:

- Achieve greater professional and personal rewards from your career
- Explore the reality that women are natural born leaders
- Build on your existing skills, talents, and strengths
- Address the 15 Critical Questions every woman should ask to ensure that she is taking the right risks in the smartest way possible.

*Positive Risk* is a ground-breaking workshop that will provide practical advice you can apply the very next day at work.

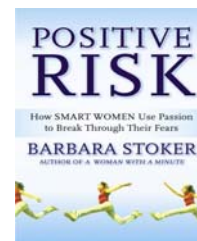
When:

Where:

Registration Cost:

RSVP:

Included in the registration you will receive a copy of





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### Sample Press Release:

#### FOR IMMEDIATE RELEASE

(Date)

#### FOR FURTHER INFORMATION

Jane Jones, Assistant Vice President  
First Bank, Washington, DC  
(202) 5551212, ext. 12

### ABC Group of Financial Women International Sponsors

#### Positive Risk: How SMART WOMEN Use Passion to Break Through Their Fears!

(Your City, State)– Insert the name of your CPF will present an exciting interactive workshop that incorporates real-life stories, plenty of practice and provides tools that can be used when you return to the office, lead your next meeting, or accept your next assignment. The workshop is sponsored by the ABC Group of Financial Women International (FWI), scheduled for 7:00 p.m. on Thursday, December 5, 2005, at the Omni Shoreham Hotel in Washington, DC.

More than 50 financial services professionals are expected to attend the meeting, which is open to the public.

*Give a brief bio of the CPF emphasizing her skills and abilities to present this program*

Participants in this workshop will have the tools they need to (list any that may be of particular interest to your market or target audience):

- Achieve greater professional and personal rewards from your career
- Explore the reality that women are natural born leaders
- Build on your existing skills, talents, and strengths
- Address the 15 Critical Questions every woman should ask to ensure that she is taking the right risks in the smartest way possible.

Founded in 1921 as the National Association of Bank Women, Financial Women International is one of the largest and oldest individual membership organizations of women financial executives. FWI's mission is to help women in the financial services industry be successful in their careers. For more information, please visit [www.fwi.org](http://www.fwi.org).

### end ###



## **Things to consider when cosponsoring an event:**

Things to think about include:

1. What is the fit of the organization with FWI
2. How will income and expenses be allocated
3. Who will be responsible for what
4. Who gets 'top billing' on the notices

Some potential co-sponsor sources (all may not be in your local area) include:

- Bank Association
- Chamber of Commerce
- Women's Entrepreneurs Organization
- American Business Women's Association
- American Society of Training and Development
- Society for Human Resource Management
- Business associations
- Business clubs for local college/university
- SCORE (sponsored by the Small Business Administration)
- American Association of University Women
- National Association of Professional Mortgage Women
- Executive Women's Golf Association