

# OKLAHOMA PROVINCE CONGRESS 2021 PLANNING TEAMS - ROLE AND RESPONSIBILITIES

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**\*\*All Team Leads will work in conjunction with the Congress Coordinator.**

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**Financial Accountability Team** – Work with the PC Central Officer Administrator. Create financial and treasury procedures to manage monies associated with Congress expenditures.

**Needed: (1) one individual to serve as Report Coordinator. Must be proficient at Excel and preferably have bookkeeping skills. Will work in conjunction with PC COA.**

Responsibilities Include:

1. Develop financial goals, standards and practices for managing treasury funds for Congress.
2. Regularly monitor financial expenditures, cash flow and incomes.
3. Set up policies and work with the Fundraising Team to monitor money being received.
4. Provides information and recommendations for registration fees (including early bird registration) to Congress Coordinator and Provincial Council (PC).
5. Prepare budget and monitor/revise on regular basis.
6. Prepare and monitor cash flow on excel spreadsheet, or equivalent.
7. Post Congress, reconcile charges against budget.
8. Prepare post Congress Financial Summary for Provincial Council review.
9. Create a master binder to include documents related to Financial Accountability preparation and planning for archive purposes.
10. Keep Congress Coordinator updated.

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**Fundraising Team** - Lead and monitor efforts that will secure funding needed to help subsidize 2021 Congress expenditures to include friar sponsorships, etc.

**Needed: One or more Communities** ([including 1 person from each community to serve as Community Liaison/on the Congress Planning Team](#))

Responsibilities Include:

1. Identify a strategy and implement goals for fundraising efforts.
2. Provide guidance and create fundraising procedures and protocol.
3. Define sponsorship criteria and protocol for communities to follow.
4. Work with Financial Accountability team to track progress and report outcomes on an ongoing basis.
5. Provide a detailed list of sponsors to Program Team.
6. Create a binder to include documents related to fundraising preparation and planning for archive purposes.
7. Keep Congress Coordinator updated.

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**Hospitality Team** - Focus on the welcome, fellowship and hospitality experience for all congress participants throughout the event by providing information, answering questions and other related activities, as needed.

**Needed: 1 Community** (including 1 person to serve as Community Liaison/Team Lead for Congress Planning Team) Community leading Hospitality may recruit members from other communities for additional team members.

Proposed Responsibilities:

Provide greeters, ushers and hosts/hostesses for Congress events and gatherings:

1. Partner with Registration Team as participants arrive.
2. Identify appropriate coverage to cover all activities to include breakout sessions, main events, ushers needed for mass, etc.
3. Develop procedure outline for all hospitality volunteers.
4. Create a checklist of all information needed to fulfill this role.
5. Create badges (or other option) to identify Hospitality team members.
6. Assist **Registration Conference Packets/Welcome Bag Support Team** with handing out Welcome Bags to attendees as they register.
7. Develop daily schedule for each event, allowing arrival time prior to each start time.
8. Create a master binder to include documents related to hospitality preparation and planning for archive purposes.
9. Consider a 'Help Desk' area, Message Board that Hospitality would check daily and/or contact list of Congress officials in case of emergency.
10. Keep Congress Coordinator updated.

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**Liturgy Team & Support Teams** - Overall responsibility for planning and coordinating all details for liturgy events and work with other related community teams responsible for areas falling under Liturgy umbrella.  
**Needed: 1 Individual (Team Lead) who will represent their community for Team A & 1 Individual (Team Lead) who will represent their community for Team B.** Individuals may create small committees (2-3 people) from their community to share duties, but only one person will serve as the Community Liaison/on the Congress Planning Team. **Team B Lead MUST be in Houston Area.**

### Team A

1. Coordinate and prepare proper LOH, Liturgy and Music for the following proposed Liturgical Schedule -  
**Friday**  
Morning Prayer  
**Saturday**  
Morning Prayer and Liturgy of the Eucharist  
**Sunday**  
Morning Prayer and Liturgy of the Eucharist
2. Responsible for securing one-time license for all music.
3. Identify and coordinate presiders, cantors, lectors, sacristans, mass servers, musicians, music leaders and gift bearers (if required) for each liturgy.
  - Identify a sacristan to be present at each session in order to check that all items are in place; provide assistance in all areas; and orient clergy and lay ministers.
  - Make appropriate contact in writing with each liturgical minister involved (specifically celebrant and homilist).
  - Prepare a master schedule with names of ministers and time/date and distribute to all involved.
  - Identify need for Ordinary Ministers for Communion distribution and prepare a diagram of flow of Communion distribution (identify Extraordinary Ministers of Holy Communion to be on standby at each liturgy).
  - Work with Hospitality Team leader to provide greeters and ushers to direct flow of communion distribution.
4. LOH: Select, identify and schedule presider, reader, music options and/or musicians for each session.
5. Prepare outline for each liturgy to include names of liturgical ministers and share with Team B.
6. Ensure that all copyright permissions are obtained, in writing, for printing in Congress program.
7. Identify if any liturgical feast day falls during Congress liturgies and select corresponding text/readings.
8. Prior to Congress, provide presiders and readers with a copy of appropriate LOH text.
9. Responsible for handing out all stipends for clergy.
10. Create a master binder to include documents related to liturgy preparation and planning for archive purposes.
11. Keep Congress Coordinator updated.

### Team B – MUST be a Community in the Houston area

1. Eucharistic Adoration –
  - Liturgy Team B will work with Adoration Room community leader to define the schedule and needs for Adoration Room.
2. Coordinate with Venue Team and Team A for recommendations on room set up and configuration for every liturgy.
3. Responsible to manage all aspects of the clergy vestment/sacred vessels and working sacristy room (must be a locked room) – work with Venue Team.

4. Plan and coordinate clerical vestments, the borrowing of sacred vessels and other liturgical needs and supplies. Designate one person to be responsible to return items after use. (Prepare itemized list i.e. hosts, wine, Lectionary, Roman Missal, altar clothes, candles, corporal, lavabo towels, cruets, purificators, etc.) If possible, for clergy driving to Congress, request that they bring their own. Otherwise, work with diocese or local parish to borrow vestments.
5. Create a master binder to include documents related to liturgical preparation and planning for archive purposes.
6. Keep Congress Coordinator updated.

### **Liturgy Support Team**

**Adoration Room Support Team** – Coordination, scheduling, set-up, etc. of Adoration/prayer room.

- Liturgy Team B will work with Adoration Room community leader to define the schedule and needs for Adoration Room.
- Adoration Room community will identify and schedule 'adorers.'
- Adoration Room community will work with the Venue Team to determine hotel logistics.
- Keep Congress Coordinator updated.

**Needed: (1) Community** (with one Community Liaison)

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**Program Team** - Design, format, prepare and manage all activities to provide a final program for Congress attendees.

**Needed: 1 Individual (Team Lead) who will represent their community.** Individual may create small committee (2-3 people) from their community to share duties, but only one person will serve as the Community Liaison/on the Congress Planning Team.

Proposed Responsibilities:

1. Develop Congress schedule based on information provided by all community teams.
2. Design format and overall look of program.
3. Prepare outline summary of format and flow of program for final approval.
4. Research best printing costs and submit for approval, coordinate printing and delivery to Congress location prior start date.
5. Review previous Congress programs.
6. Suggestions for Table of Content topics:
  - Dignitary introduction and welcome letters.
  - Schedule, prayers and congress information.
  - Liturgy of Hours full texts and Mass worship information, to include music.
  - Speakers, bio/profile and topic descriptions.
  - Sponsor ads/acknowledgements and other advertising.
  - Memorials and commendations from past year.
  - Maps/venue layout.
  - Thank you notes and acknowledgements.
  - Page with copyright permissions (Liturgy of Hours and music).
7. Post electronic version of completed program on website prior to Congress.
8. Create a master binder to include documents related to program preparation and planning for archive purposes.
9. Keep Congress Coordinator updated.

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**Publicity/Marketing Team** - Responsible for overall event promotion and work with other related community teams that fall under publicity/marketing umbrella.

**Needed: 1 Individual (Team Lead) who will represent their community.** Individual may create small committee (2-3 people) from their community to share duties, but only one person will serve as the Community Liaison/on the Congress Planning Team.

Proposed Responsibilities:

1. Create marketing strategy for entire lifecycle of Congress integration, planning and post-Congress follow up.
2. Prepare communique to community Presidents (all three Provinces), to include
  - Initial email announcement
  - Email teasers
  - Website announcements
  - Quarterly or monthly Congress update bulletins to community presidents (depending on timing and outreach prior to Congress)
3. Create pre conference outreach advertising.
  - Congress brochure for registration
  - Other related material, as needed
4. Develop quarterly updates for FLOS with the latest information.
5. Consider creative ways to effectively publicize the event.
6. Consider the need for event sponsors and communicate ideas with Fundraiser Team.
7. Prepare signs and banners for hotel.
8. Prepare post-conference survey for website.
9. Create a master binder to include documents related to publicity/marketing preparation and planning for archive purposes.
10. Keep Congress Coordinator updated.

**Publicity/Marketing Support Team:** Logo Team

**Needed: 1 Individual (Team Lead).** Individual may create small committee (2-3 people) from their community to share duties.

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**Registration Team** - Manage and organize all details of the registration life-cycle; work with Website and Hospitality Teams to coordinate related activities.

**Needed: 1 Community** (including 1 person to serve as Community Liaison/Team Lead for Congress Planning Team & 1 person to serve as Registrar) *If Community leading Registration is not in Houston, it will need to recruit members from communities in Houston for #6 and #7 below, as well as help man tables at Congress.*

#### Proposed Responsibilities:

##### **Pre Conference**

1. Coordinate with Publicity/Marketing Team to create a reservation form for website (include all necessary information, special dietary requirements or special accommodations, et al.)
2. Work with Congress Coordinator to identify 'go live date' for registration; early bird registration protocol; and end date for Congress registration.
3. Maintain ongoing list of paid registrants, to include notes about lodging needs and other accommodations (work with Financial Accountability Team).
4. Develop policy and parameters for registration refund requests, what to do when a confirmed registrant sends a replacement. (Consider all scenarios.)
5. Procedure for confirming registration payment and establish effective process for tracking and monitoring registrations.
6. Purchase supplies and prepare name tags/plastic holders prior to Congress.
7. Create supply list and collect all supplies for registration table at Congress (pens, paper clips, stapler, tape, scissors, markers, envelopes, extra name tags et al).
8. Create proposed budget for registration needs and send to Financial Accountability Team as soon as possible.
9. Work with Publicity/Marketing to identify any signage needed.
10. Create a master binder to include documents related to registration preparation and planning for archive purposes.
11. Keep Congress Coordinator updated.

##### **Onsite Registration**

1. Identify schedule and timeframe for registration (for schedule).
2. Create master schedule of all volunteers to work registration table.

##### **Post Congress**

Write *thank you* notes to all who contributed to the gift bag goodies.

#### **Registration Conference Packets/Welcome Bag Support Team**

**Needed: 1 Community.** May be ideal for a small community. **Community must be near the venue** because *team members will need to be available pre-Congress to stuff bags.*

1. Identify items/materials for registration packets.
2. Research and order registration tote bags (theme related) -- work with Publicity/Marketing Team.
3. Contact state and local tourism for handout materials.
4. Contact local merchants/businesses for donations or samples of products for gift bags.
5. Stuff/prepare registration conference packets/welcome bags pre Congress at the hotel.

**Speakers/Presentation Team** - Based on Congress theme, team is responsible for selecting all details in identifying excellent speakers and coordinating and scheduling out all speakers, panelists, facilitators and presentations; work with other related community teams that fall under speakers/presentations umbrella. **Needed: 2 Individuals (Team Leads). 1 Individual for Team A who will represent their community & 1 Individual for Team B who will represent their community.** Individuals may create small committees (2-3 people) from their community to share duties, but only one person will serve as the Community Liaison/on the Congress Planning Team.

Proposed Responsibilities:

**Team A**

1. Create list of potential speakers (to include OCD, OCDS and other quality speakers) – will need 4-5 speakers. Prior to extending an invitation, send recommendations to Congress Coordinator for final review by Provincial Council.
2. Send each speaker an official communique, in writing, confirming attendance; outlining presentation requirements; audio/visual needs; request for consent to record presentation (ask if there are copyright issues); provide Congress website address; request travel itinerary; will they need pick up at airport; and confirm that travel and hotel accommodations will be covered by Congress funds.
3. Create a consolidated list of all information identified in #3.
4. Prepare budget recommendations for stipends, travel costs and room accommodations for speakers and submit to Financial Accountability Team as soon as possible.
5. Invite Father Provincial and General Delegate (request a welcome letter/photograph for program): a designate from one of these offices is to be scheduled as a speaker at opening session.
6. Identify quality OCDS member to MC and all general session.
  - a. Recommend one quality MC who will who will deliver 'welcome remarks' at the beginning of each general session, introduce speakers and provide a short introduction of bio/profiles at each general session.
7. Prepare scripts/talking points for MC.
8. Prepare Keynote speaker bio/profile for entry into program booklet (include photograph).
9. Prepare bio/profiles for every speaker for entry into program booklet (include photograph).
10. Complete speaker information form for every speaker (to include needs/profile/contact information and photograph, for example). Sample form provided by Congress Coordinator.
11. Work with Venue Team in communicating appropriate room configuration(s).
12. Work with Publicity/Marketing in preparing room signage, table tents, etc.
13. Identify any logistical requirements and coordinate with Community Support Teams.
14. Create a master binder to include documents related to speaker/presentation preparation and planning for archive purposes.
15. Keep Congress Coordinator updated.

**Team B**

1. Discern and select 'series workshops' topics.
2. Create list of potential quality OCDS presenters – consider 6-7. Prior to extending invitations, send recommendations to Congress Coordinator for final review by Provincial Council.
3. Send each speaker an official communique, in writing, confirming attendance; outlining presentation requirements; audio/visual needs; request for consent to record presentation (ask if there are any copyright issues).
4. Create a consolidated list of all information identified in #3.
5. Identify quality OCDS members (MC) to introduce series presenters in breakout rooms. You may coordinate this through the Hospitality Team as they will have greeter/hosts available at each session.

6. Prepare scripts/talking points for each MC.
7. Prepare profile and description of presentation for entry into program booklet.
8. Complete speaker information form for every presenter. Form provided by Congress Coordinator.
9. Work with Venue Team in communicating appropriate room configuration(s).
10. Create a master binder to include documents related to speaker/presentation preparation and planning for archive purposes.
11. Keep Congress Coordinator updated.

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**Special Events Team** - Coordinate and manage extracurricular entertainment events around scheduled Congress agenda such as musicians, singers or other social activities.

**Needed: 1 Individual (Team Lead) who will represent their community.** Individual may create small committee (2-3 people) from their community to share duties, but only one person will serve as the Community Liaison/on the Congress Planning Team. **(Need someone near venue in Houston)**

Proposed Responsibilities:

1. Coordinate an entertainment event and/or activity. Send recommendations to Congress Coordinator for final review by Provincial Council.
2. Coordinate possible offsite event (pending venue location). Information to be provided by Congress Coordinator at a later time.
3. Work with Venue Team in communicating appropriate room configuration(s) and any audio/visual needs.
4. Work with Publicity/Marketing in preparing advertising, room signage, table tents, etc.
5. Identify any logistical requirements and coordinate with Community Support Teams, if needed.
6. Create a master binder to include documents related to special events preparation and planning for archive purposes.
7. Keep Congress Coordinator updated.

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**Vendor/Vendor Room Team** - Responsible for all activities required for vendors and vendor room activities and logistics.

**Needed: 1 Community** (including 1 person to serve as Community Liaison/Team Lead for Congress Planning Team) *If Lead Community is not in Houston, it will need to recruit team members from communities near venue for Vendor Room set-up.*

Proposed Responsibilities:

1. Solicit and work with vendors throughout Congress.
2. Make vendor contacts and make decisions on quality of content and value.
3. Document all vendor information for archive purposes.
4. Develop master list of suppliers.
5. Coordinate space, set up and all logistics.
6. Set up and schedule team members to man Congress vendor table.
7. Determine any hotel charges for receiving shipments and transporting vendor shipments. Report findings to Congress Coordinator.
8. Coordinate signage with Publicity/Marketing Team.
9. Submit vendor information to Program Team.
10. Create a master binder to include documents related to vendor preparation and planning for archive purposes.
11. Keep Congress Coordinator updated.

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**Venue Team Lead** - Overall responsibility for hotel/on-site logistics for Congress, and work with other related community teams that fall under venue umbrella, including Registration and Speaker/Presentation.

**Needed: (1) one Individual (MUST be in Houston area).** This person will work directly with Congress Coordinator.

Proposed Responsibilities:

1. Inspect location and complete Venue Inspection checklist.
2. Coordinate venue activities to include the following:
  - Prepare summary of conference facilities and room capacities
  - Negotiate venue agreements (to be coordinated with Congress Coordinator)
  - Arrange for pre-Congress IPC meetings rooms and reservations for attendees (Tuesday/Wednesday – approx. 20 attendees)
  - Food/beverage planning (including banquet)
  - Identify seating capacity in each room
  - Parking costs and/or other options
3. Confirm rooming list with hotel prior to event (provided by Registration Team).
4. Develop description of every gathering space to be shared with other venue support teams.
5. Prepare detailed outline of all costs/fees.
6. Create a master binder to include documents related to venue coordination and planning for archive purposes.
7. Keep Congress Coordinator updated.

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**Website Team Lead** - Manage and maintain central OCDS 2021 Congress website, providing vital information.

**Needed: (1) one Individual.** This person will work directly with Congress Coordinator.

Proposed Responsibilities:

1. Maintain/update Congress information on 'Congress-specific' website as needed.
2. Create link from Oklahoma province site <http://www.thereocds.org/> to Congress website.
3. Develop outline all topics and materials that should go on the website.
4. Proposed information for website:
  - Theme and logo
  - Speaker profiles, presentation topics/description and related handouts
  - Congress agenda
  - Travel, venue and hotel information
  - Weather/maps/directions
  - Advertising and sponsorship information
  - Registration
5. Review website of latest Congress.
6. Research options and costs for setting up online registration (i.e., Pay Pal, etc.)
7. Create a binder to include documents related to website preparation and planning.
8. Keep Congress Coordinator updated.

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