



At the Intersection of Vision and Impact



PROPOSAL TO:

Central Wasatch Commission

PROPOSAL FOR:

Event Management Services | CWC 2nd Annual Symposium

DATE:

May 29, 2025



About Us

The Pathway Group is a women-owned firm founded in 2000 and based in Salt Lake City, Utah. We envision a world where nonprofits, governments, and philanthropists are driving transformational change with their communities. We work with clients across the United States to build their capacity for long-term viability, efficiency, and effectiveness.

We are dedicated to strengthening the organizations we serve and creating sustainable solutions. What makes our firm successful is a unique combination of experience, commitment, and innovative ideas. We pride ourselves on a collaborative, equity-centered approach that yields high-quality results. Pathway is proud to offer a comprehensive suite of services to organizations of all sizes who seek support, expert guidance, planning and more.

Fundraising Excellence: The Pathway Group offers customized services to elevate your fundraising initiatives and help you reach your revenue goals. From campaign planning to our signature annual fundraising process, Pathfinder, we offer expert guidance to drive philanthropic objectives, achieve revenue sustainability, and maximize impact.

Governance & Leadership: The Pathway Group's governance and leadership services enhance organizational excellence. We offer customized solutions for board governance, executive coaching for leaders at all levels, strategic financial and operational services, and detailed approaches to fostering organizational inclusion, diversity, equity, and access (IDEA) initiatives.

Strategy & Planning: The Pathway Group's strategy and planning services are catalysts for transformative change and sustainable growth across organizations of all sizes. Through our expertise in strategic planning, consensus-building, and community engagement, we provide a holistic approach that aligns with your organization's unique journey.

Executive Search & Transitions: The Pathway Group provides specialized transition services tailored to support organizations through leadership changes. Our team facilitates executive search processes, offers experienced interim leaders, and bridges leadership gaps with personalized onboarding and coaching. We help ensure smooth leadership transitions and nurture talent for sustained organizational growth and success.

Philanthropy Advising: The Pathway Group's philanthropy advising services are instrumental in aligning impactful giving with the core values of individuals, families, or corporations. We empower donors through comprehensive education and encourage informed decision-making. Leveraging our expertise in grant-making and extensive knowledge of best practices, we support your team and offer strategic guidance throughout the entirety of the grant cycle.

Scope of Services

Event Planning & Execution

Pathway will provide event planning support and lead a team of volunteers through the execution of tasks and activities during the event. This proposal assumes Lia Summers will assist with event planning and be on-site during the event. The successful execution of the event is estimated to require the support of 7-10 dedicated volunteers in addition to the Pathway event coordinator.

- **Event Planning Support.** Pathway will set up a schedule of regular consultations with CWC staff to review event plans, structure volunteer responsibilities, and offer suggestions for improvements where requested. Pathway will also be available to offer support via email in between meetings.
 - Pre-Event Volunteer Training: Pathway will update volunteer training materials, conduct up to 2 one-hour volunteer training sessions, create and provide individualized itineraries to each volunteer that outline assignment time, location, and detailed responsibilities.
- **Event Execution.** Pathway will lead a team of volunteers to execute run-of-show efforts during the event. This includes:
 - Efficient Volunteer-Led Registration and Check-In: We will manage a smooth check-in and registration process, and distribute event materials. The registration area will also serve as an information table to address any inquiries and provide immediate assistance to attendees.
 - Guided Attendee Navigation: Pathway and event staff will actively assist attendees in finding their session rooms, helping to maintain a timely schedule and minimize confusion.
 - Dedicated Speaker Support: We will provide support to speakers in both the main auditorium and breakout rooms, ensuring that all technical and logistical needs are met promptly. This includes assisting with presentations, time-keeping, and facilitating speaker transitions.
 - Event setup and breakdown: Pathway will oversee all aspects of event setup and breakdown, guiding volunteers to ensure a smooth, efficient process in alignment with venue requirements. Including coordinating the setup and continuous restocking of refreshments or catering provided by CWC, monitoring waste stations, replacing full trash bins, and maintaining a clean environment throughout the event, managing the placement, replacement, and post-event packing of table linens, ensuring event spaces remain tidy and presentable during the event and are fully restored to their original condition afterward.
- **Event Debrief.** Pathway will conduct a debrief session following the Central Wasatch Symposium to evaluate the event's successes and pinpoint any challenges encountered. During this review, we will assess performance against objectives. Following the review session, Pathway will compile and deliver a detailed report, which will include actionable recommendations and strategic advice designed to enhance and refine the planning and execution of next year's event.

Proposed Services

The Pathway group offers two versions of our proposed services at different budget thresholds to assist the Central Wasatch Commission in selecting a service level that will meet its needs.

Proposal	A	B
Planning Meetings	<ul style="list-style-type: none"> Kick-off meeting mid-September 2025 30-minute meetings every 2 weeks to review plans and offer guidance through December 2025 (approx. 7 meetings) 60-minute weekly meetings from mid-December 2025 until event in January 2026 (approx. 2-3 meetings) One additional meeting in the week of or before the event <ul style="list-style-type: none"> ~8 hours 	<ul style="list-style-type: none"> Kick-off meeting mid-October 2025 30-minute meetings every 3 weeks to review plans and offer guidance through December 2025 (approx. 3-4 meetings) 30-minute weekly meetings starting January 2026 until event (2 meetings) <ul style="list-style-type: none"> ~3.5 hours
Event Staffing	<ul style="list-style-type: none"> Pathway event coordinator to train, organize, and direct volunteers provided by CWC (hour estimates calculated across task details) 	<ul style="list-style-type: none"> Pathway event coordinator to train, organize, and direct volunteers provided by CWC (hour estimates calculated across task details)
Event Materials	<ul style="list-style-type: none"> Pathway develops volunteer training materials (~1-2 hours) and volunteer assignment schedule (~5-6 hours) Pathway develops individualized volunteer itineraries (~10 hours) Pathway prepares event debrief report (~3 hours) 	<ul style="list-style-type: none"> Pathway develops volunteer training materials (~1-2 hours) and volunteer assignment schedule (~5-6 hours) Pathway develops individualized volunteer itineraries (~10 hours) Pathway prepares event debrief report (~3 hours)
Pre/Post-Event Coordination	<ul style="list-style-type: none"> 2 one-hour Zoom trainings for event volunteers to review assignments led by Pathway (~3 hours for prep and trainings) Pathway event coordinator to arrive one hour before the event and stay until one hour after the event's scheduled end (~18 hours) 	<ul style="list-style-type: none"> One-hour Zoom training for event staff and volunteers to review assignments led by Pathway (~1.5 hours for prep and training) Pathway event coordinator to arrive one hour before the event and stay until the event's scheduled end (~16 hours)
Dedicated Hours	~45 hours	~42 hours
Total Cost	\$3,825	\$3,570



Timeline & Fees

Pathway is prepared to begin this project in September or October 2025, and anticipates completion by January 30, 2026. Pathway proposes providing the Event Management services described above for a flat fee of \$3,850 or \$3,570 (depending on service level selected) with an initial payment of 50% due upon signature of contract and the balance payable at project end.

Pathway Group submits invoices on the last day of the month, covering services rendered during the previous period. All invoices are due and payable upon receipt.

The Team

Project Team Role – Event Management

LEAD CONSULTANT:

Lia Summers, will lead the project.



Lia Summers, MBA, will lead this project as a project manager and event coordinator. She is a seasoned impact strategist and consultant with a diverse background in various industries, both in the public and private sectors. Lia holds an MBA and a Graduate Certificate in Business Analytics from the University of Utah and has a strong track record of planning and executing successful, high-impact initiatives. Her expertise includes stakeholder engagement, performance analysis and reporting, customer/constituent experience strategy, and process improvement.

Lia has several certifications in project and change management. She is adept at mitigating risks and navigating sensitive obstacles.