



At the Intersection of Vision and Impact



PROPOSAL TO:

Central Wasatch Commission

PROPOSAL FOR:

Event Support Services | CWC 3rd Annual Symposium

DATE:

August 12, 2026



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 volunteer preparation and facilitation support during the event. This proposal assumes Lia Summers will assist with volunteer preparation and provide on-site supervision, direction, and participation in executing event tasks and activities during the event. The successful execution of the event is estimated to require the support of 3-4 dedicated volunteers in addition to the Pathway event coordinator.

- **Event Preparation Support.** Pathway will work with CWC to collect volunteer availability and develop a shift schedule. Pathway will also update volunteer training materials, conduct a one-hour volunteer training session, and create and provide individualized itineraries for 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.
 - Dedicated Speaker Support: We will provide support to speakers, 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 any 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; and ensuring event spaces remain tidy and presentable during the event and are fully restored to their original condition afterward.
- **Event Debrief.** Pathway will compile a one-page report that includes actionable recommendations and strategic advice designed to enhance and refine the planning, including lessons learned from hosting the event at a new venue.

Proposed Services

Kick-off and volunteer training

- 45-minute kick-off meeting in early December to coordinate volunteer recruiting, scheduling, and training efforts.
- 1-hour training in early January (likely virtual, but open to on-site, if preferred).
- ~8 hours to prepare schedule, update training, and develop individual itineraries.
- Optional 30-minute meeting the week of the event to confirm all details.

Event Coordination

- Pathway event coordinator to arrive one hour before the event and stay until one hour after the event's scheduled end (~8-9 hours)

Debrief

- Pathway delivers one-page debrief document noting successes and challenges, particularly surrounding new space and program format.

Dedicated Hours: ~20

Total Fee: \$2,500



Timeline & Fees

Pathway is prepared to begin this project in early December 2026, and anticipates completion by January 30, 2026. Pathway proposes providing the Event Support services described above for a flat fee of \$2,500 or 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.