

AGENCY WIDE INTERNAL EVENT PLANNER

Event Name

Date

Meeting or Registration Link

Event Point of Contact

Identify who will fill the following roles. Details can be found at the bottom of the page.

Tech Support

Facilitator

Host/Presenter

PLANNING THE EVENT

Plan for resources:

Identify potential dates and consult with Internal Events Calendar

Point of Contact should:

Reserve a Zoom line (if needed) by emailing: **Andrew.Shute@centerffs.org** and include the following information:

Event Title

Date and Start/End Time

Logo if appropriate

Anticipated number of attendees

If Registration is required

Point of Contact email address to receive questions about event from participants (incl. requests for accommodation)

Send calendar invite to all responsible parties immediately, including Tech Support, and invite "Internal Events Calendar"

Reserve Menti tool (if needed) by emailing: TrainingDept@centerffs.org

Plan for accommodations by ensuring invite includes request for accommodations, and indicate Point of Contact email for these requests

Determine if the event could/should be managed through Relias by emailing: TrainingDept@centerffs.org

Marketing the event:

Designate who will post and what will be posted on the Staff Portal Events Calendar

Designate who will prepare email communication to staff and connect with **Denise.Dailyda@centerffs.org**

Include accommodations request: "To request accommodations for this live event, please email Point of Contact"

Connect with **Denise Dailyda** to request *CFS Events* calendar invite, if appropriate, and all staff email is sent

If a committee member has access to send all staff emails, you may send out your own all staff email from your committee/group email

Designate who will oversee event registration, if necessary

Prepare Timed Agenda including the following items:

Names all co-hosts and staff that should be admitted early for event set up

Timing of speaker(s), presentation sharing, breaks, and any other elements

all presentation, videos, music, sound, etc. must indicate how and when to be shared (with sound, sound only, visual only, etc.) If a

Poll is requested:

send questions and answers for each poll to **Tech Support**

include on the agenda when poll(s) will take place

If **Breakout Rooms** are requested:

Include on the agenda when breakout rooms will take place

How many people per room, and how much time is needed per breakout? If

used more than once, will groups stay the same or change?

14 days prior to event:

Facilitator will request and arrange for captioning or interpreter accommodations (if requested or recommended based on group size; email TrainingDept for questions)

Host/Presenter to make sure all links, videos, sounds, etc. within presentation are up to date and fully operational

7 days prior to event:

Point of Contact will share: Final Agenda, Presentation Copy, and Handouts/Links with all responsible parties

Facilitator will share materials with captioners/interpreters if necessary

Host/Presenter to make sure all links, videos, sounds, etc. within presentation are up to date and fully operational

Best Practice: **Point of Contact** to schedule run through with all responsible parties on or before this time

If Tech Support is unavailable, team may update Tech Support with any final changes to plan and Timed Agenda Test

all videos, links, sounds, music, polls, etc. during run through

DAY OF EVENT

TECH SUPPORT

Arrive 30 min before scheduled start time

Pass co-host privileges to facilitator(s), presenter(s), any listed staff on Timed Agenda

Monitor waiting room and admit participants

Manage breakout rooms and Zoom tools (as determined by agenda)

Provide remote technical support to participants

Mute participants, turn off video, and/or remove participants as needed

Spotlight speakers according to agenda

Share presentation if requested

Have backup presentation materials open and ready

Supply Zoom report after meeting if requested

Drop handouts/links in chat (as determined by agenda)

FACILITATOR

Arrive 30 min before scheduled start time

Welcome participants and share ground rules/announcements

Introduce Presenter

Monitor chat for topical questions and participant engagement

Share link for Captioning in chat if necessary

Remind participants about survey/certificates during intro/closing

Share Survey/Course Eval Link if applicable

Mark attendance in Relias if applicable

Close session by announcing survey, upcoming agency events, and thanking participants

HOST/PRESENTER

Arrive 30 min before scheduled start time

Share materials during prep time, including testing all links, sounds, videos, etc.

Share/present materials during training unless agenda states otherwise

Supply all materials, handouts, and final agenda to all parties no later than 7 days before the event

FACILITATOR LIFEHACKS

PREPARE AHEAD OF TIME

- Log in to your meeting 30 min ahead, and use this pre-training block wisely
 - **Assign co-host!** If hosting independently, always assign a trusted participant co-host in case you get kicked off!
 - Determine what **participant view** you want participants to have: Gallery, Speaker Spotlight
 - **Test all PowerPoints and media** you intend to share
 - Have the latest copy of the **course material packet ready** to drop into the chat to share
 - Open this on your computer in case you need to reference page numbers or share the screen
 - Test any **polls** or **breakout rooms** planned
- While you are preparing, open up a draft email and prepare for this step:
 - Copy the meeting link, prepare an email to send to participants who may be late but could still attend

Hello there! We have you registered for today's live course **XXXX**. I do not see you present in the Zoom meeting. Are you able to join by **XX:XX**?

If so, here is the link: **PASTE LINK.**

If you are not able to join by that time, please sign up for the next session you are available for.

- 5-10 minutes in the course start time, send the email to anyone not present.

FACILITATOR WELCOME AND INTRO

MESSAGE TO WAITING ROOM PARTICIPANTS:

- Send a message to participants in the waiting room to let them know pre-session instructions, reminders, or if you are running behind. An example:
 - Welcome to today's training! We'll get started in just a few minutes. While you are waiting:
 - Ensure the name you have displayed here matches your name
 - Make sure you have a copy the handouts open on your computer
 - If you are taking this training in a shared space, use headphones to preserve the privacy of other participants
 - When you are attending one of our live-virtual trainings, we want you to attend as if it was an in-person training! Make certain you have cleared your schedule with your supervisor for this entire meeting time so you can be fully present.
 - Please ensure you have your camera on and are ready to participate! If you have any issues, just message me directly once we start the training.

AFTER ADMITTING:

- Welcome and brief self intro. Verbally advise participants:
 - Muted upon entry, come off to participate or say hello
 - Name on screen match your real name
 - On your own device, message me directly if you have issues
 - **You are not permitted to drive while taking a training.** Sessions require engagement with polls, breakout rooms, chat, and presentations and you must be in a safe and stationary place where you are able to interact and use your device.
 - Address how to access Course Materials if applicable
 - Survey Instructions if applicable

- When you are attending one of our live-virtual trainings, we want you to attend as if it was an in-person training! Make certain you have cleared your schedule with your supervisor for this time so you can be fully present.
 - “be fully present” - not performing another job function while in training; of course, if you get an emergency that you must take, message me directly;
 - **Again, you are not permitted to drive while taking a training**
 - Live-interactive experience; create **safe and supportive environment**;
 - Expectation of privacy for the conversations and thoughts we are going to learn about and exchange, and we need your help in promoting and protecting the safe learning environment.
 - This means:
 - Camera ON for duration if all possible; message me directly if having issues with video/audio
 - Use headphones if you are in a shared space where people can overhear
 - If someone’s camera is off and are not responsive to breakouts or messages, for more than 15 minutes, they will be removed from the training. we want to have a safe and supportive learning environment, ensuring transparency, and to preserve the expectations of **privacy** on this training, we need to know who is on the other side of the screen.

DURING THE COURSE

- Anyone requesting accommodations should have done so at least 7 days prior to the event through the TrainingDept. We are unable to accommodate same-day requests.
- As soon as you are finished with your self introduction, send your email reminder to no-show participants if possible.
- If sharing a video or song, be sure to click “**Share Sound**” in the lower left portion of the share screen box.
- **During Breakout Rooms**
 - **Use the zoom timer!** This can help participants from feeling jerked out of a conversation when they can all see the same timer.
 - Click “Options” in the lower left corner of the breakout rooms screen.
 - **Share on screen instructions directly to the breakout rooms** by using Share Screen, and clicking “**Share to Breakout Rooms**” in the lower left corner.
 - You may also **broadcast messages to the group**. Characters are limited.