# Virtual Event Planning Checklist

Virtual events are useful tools for reaching larger audiences. Preparing for a virtual event is somewhat different than planning for in-person meetings but requires the same level of effort and planning. In addition to this document, please refer to the Virtual Event Case Study to learn more about how a ConnectHomeUSA community planned and implemented a virtual convening.

The ConnectHomeUSA Team has prepared a step-by-step list and suggested timeline to assist in planning a virtual event. The ten steps highlighted here include:

1. Identify Event Goals and Specifics

2. Develop an Event Timeline

3. Identify a Virtual Platform

4. Set the Agenda

5. Set Up the Event on Your Virtual Platform

6. Create and Implement an Outreach and Marketing Plan

7. Start Practicing!

8. Final Logistics: Getting Ready for the Event

9. Launching Your Event

10. Event Follow-Up
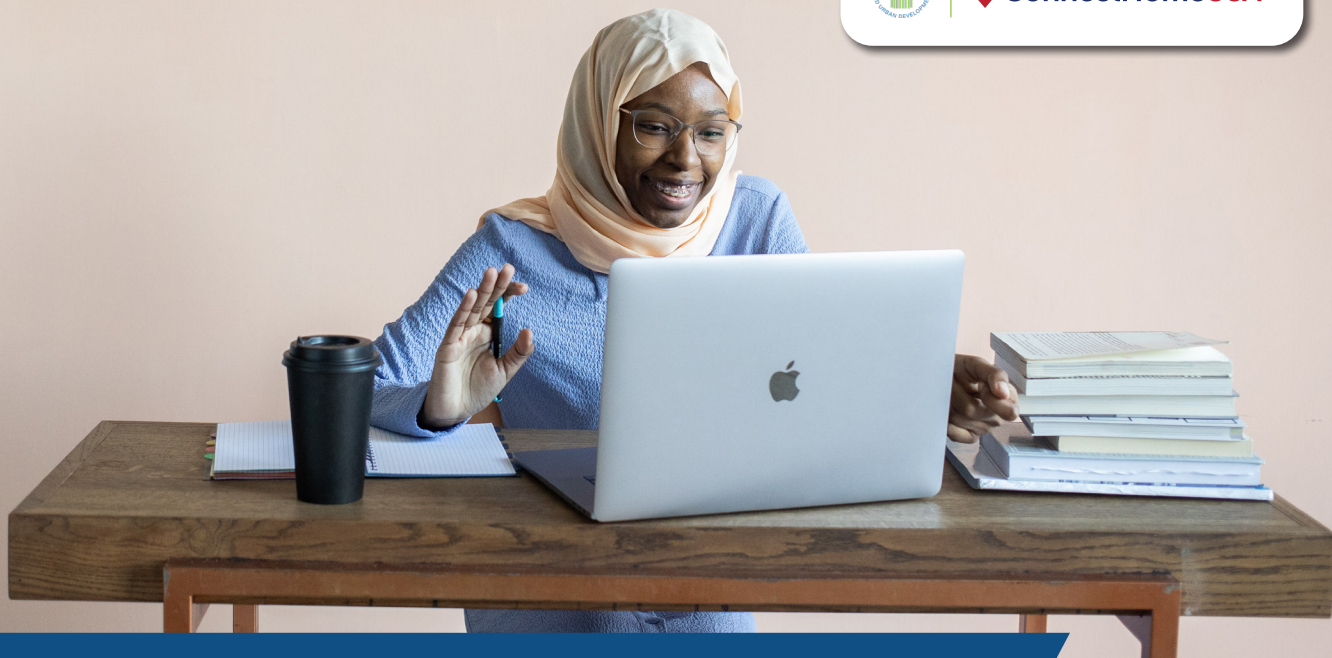
I. Identify Event Goals and Specifics – 4 to 6 months out

There are key decisions that should be made early on to help shape your event and guide planning. While these decisions are similar to those that you would make for an in-person event, remember that a virtual platform could help potentially reach a larger audience. Below are some questions you should consider when identifing our event goals and specifics.

- What are the goals for your event? What are the objectives?
  - This is the most important first step and should inform all other decisions made.
  - Check out the S.M.A.R.T Goal Planning Template (included with this toolkit) to get started.

- Who from your agency will lead the logistics? Who will be the support team?
  - Consider identifying an Event Lead and Co-Lead as well as committee chairs that are responsible for different parts of the event including outreach and publicity, day-of-logistics, virtual platform manager, etc.

- What is your event topic?

- Who is your target audience?

- Who will you invite to speak?

- How many people will you invite? How many people do you expect to attend? Will you have a cap on number of attendees (or does your virtual platform have a cap built in)?

- When do you want to hold the event? Select a date.
  - Give yourself enough time to realistically plan the event. Experts recommend 4 to 6 months to plan an event but be flexible and do what works for your team!
  - Check dates with key participants such as speakers and presenters.

- Who will host the event? Will the event be co-hosted with other partners?

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II. Develop an Event Timeline – 4 to 5 months out

Once you have identified your **Event Goals and Specifics**, the real planning begins. The Event Lead (and any co-leads) should begin by developing an **Event Timeline**. Creating this timeline will ensure that the team remains on track.

Tip: *Don't forget to include regular planning team check-ins in your timeline!*

This timeline should be as definitive as possible, meaning that the deadlines set should not change unless there's a very good reason. Shifting timelines can lead to a delayed or canceled event! Encourage individual team members to develop their own timelines for the tasks they're responsible for – this will ensure that they meet the deadlines they are responsible for. You can easily adapt the *Convening Project Plan Template* in the **Convening Toolkit** to start inputting your tasks, key staff, and deadlines for any virtual event.

What to include in your timeline?

• Outline of major tasks
• Roles and responsibilities of key staff
• Deadlines
• Barriers
• Notes

III. Identify a Virtual Platform – 4 to 5 months out

While planning a virtual event, it is important that the online meeting platform you select meet your needs. We have included a list of possible platforms along with a description of capabilities and limitations in Appendix I of this document. There are several things to consider when choosing a virtual platform:

• **Audience size** – Can your platform accommodate the expected number of participants?

• **Recording –** If you want to record your session for future use, make sure your platform is able to do this.

• **Partner Access** – Can your event partners access your selected platform?

• **Engagement** – How interactive do you want your event to be? Does it have the capability to create breakout rooms? Can your platform accommodate the level of participant engagement you hope to have?

Note: If your organization already has a platform it uses, make sure to do your research and see how you can best utilize the platform for your event.

• **Device accessibility** – Not everyone has a laptop/desktop, so make sure that participants will be able to access the event from a phone or other device.

• **Cost** – There are different virtual event platforms available at different cost levels (See Appendix I).

• **Breakout rooms** – If you want participants to do any type of group work or collaboration, consider enabling breakout rooms. Most platforms have some form of breakout rooms.

• **Polling** – Polls are a useful and a relatively easy way to engage your audience – make sure that this feature is enabled when setting up your meeting.

• **Interpretation** – If your event will reach a multilingual audience, make sure that your platform has a simultaneous translation function. You may need to provide the interpreters.

IV. Set the Agenda – 4 months out

Start planning the agenda early so that you can share as much information as possible with potential registrants. Use the goals developed earlier to help inform the agenda.

- Your agenda should reflect your goals and objectives.
- Develop your agenda with partner and stakeholder input.
- As your agenda takes shape, begin inviting speakers.
- Include time for audience participation.
- Create polling questions and encourage participation through your platform's chat function.

Tip: *Develop a timeline for completion of agenda and presentation materials and make sure that all involved with development of materials are on board with the timeline.*

Preparation of other necessary materials can begin now, including:

- PowerPoint presentation template to share with speakers
- Worksheets
- Discussion prompts for breakout rooms

As you develop the materials, be sure to also develop a set of expectations and guidelines for participants.

- Expectations can include:
  › Use your video if you are able
  › Come ready to participate
  › Bring a pen and paper for activities
  › Anything else you think is important

- Guidelines can include:
  › Instructions on how to use the platform
  › All links, passwords, logon instructions and participant protocols (e.g. keeping mics on mute) that are needed for the session
  › Putting this all in one place will be really helpful to participants

- Make sure to work with your event partner(s) when reviewing the guidelines.

- At this stage your team should also think about desired outcomes from the event and how to continue to engage participants and partners after the event concludes.

☐ V. Select & Set Up the Event on Your Virtual Platform – 3 months out

Once you have your registration system set up, make sure to send it out to invitees, announcing any keynote speakers and highlights from your agenda. Set up your meeting and any breakout sessions using your virtual platform.

• Pay special attention to the different functions you can enable/disable and determine what makes the most sense for the goals of your event.

• **Set up your registration link**

  – Most virtual event platforms have systems for creating registration links to make it easy for you to track registrants and send out event information (like log-in instructions).

  – Make sure that your registration link is functional before sending it out.

  – If your platform does not have an option for registration, there are a few free registration platforms you can use including, but not limited to:

    › Ti.to

    › EventBrite

Event Planning Templates

There are several free event planning templates available online to help you get started. A few resources to help you get started:

• SmartSheet Free Event Planning Templates

• EventBrite Marketing and Advertising Plan Template

• AmeriCorps Outreach Plan Handout

• CVent Event Marketing Plan and Tips

What kind of information should you collect at registration?

It depends on the event and what metrics you are looking to track. It is important to consider this early on so that you are not missing information at the end of the event. You also want to make sure not to ask too much of registrants, you don't want to overwhelm them.

Ask yourself the following questions when deciding what information to gather:

• What information will I want to share with partners after the event?

• Are there any metrics that you are required to track?

• Is there any information that would helpful for the organizers to know about registrants beforehand?

• Is there any information that people may not feel comfortable giving out or could potentially discourage people from signing up? If so, can this information be removed or be made optional?

Some sample questions metrics to collect include:

• First and Last Name

• Email

• Phone Number

• Organization (if applicable)

• Building name (if applicable)

• Accessibility questions

• Wheelchair access (if in person)

• Language preference

• Questions or concerns

VI. Create and Implement an Outreach and Marketing Plan – 3-4 months

No one can attend your carefully planned event if they do not know about it! Establishing an outreach plan early is as important as developing the content. A few things to consider when developing your plan:

- Do you have a listserv that you can use for outreach? If not, start compiling one.

- Which methods does your organization use for advertising events? Or, alternatively, which methods does your organization use to inform residents about events? What has been most effective? Texts, emails, voicemails, flyers, a combination?

- Use your social media platforms as well, and do not forget to use your organization's website!

  – Check out the Media Toolkit and Guide for more tips.

- Is there any information you want to collect at registration? See above for more information.

- Outreach to participants should begin as soon as possible, but no later than one month before the event.

- Make sure to include registration links, event guidelines and event goals in your outreach materials.

> **Tip:** *As a first step, you can use a "Save-the-Date" card (electronic and/or paper) to let participants   know about the date of your event followed by more in-depth messaging.*

VII. Start practicing! – 1 month to 2 weeks out

Technical issues may arise during a virtual event, but practice and familiarizing yourself with your chosen platform will allow you to handle technical issues with ease.

- There should be two people who will manage the platform: *One lead and a backup who should both be comfortable with the ins-and-outs of your platform. Depending on the size of the audience, having two people behind the scenes can also help cover the following tasks:*

    – Navigating the slides (keep in mind that whoever is sharing the slides will be sharing their screen and therefore cannot do other platform managing activities unless they have multiple computer monitors)

    – Monitoring the chat box

    – Responding to emails from participants experiencing technical difficulties

    – Keeping time

- Schedule a practice session for all presenters prior to the event. *Early on in the planning process, you should schedule a practice session at least 1 week (but 2 is preferable) in advance of the session.*

    – It is okay if all the materials are not ready by then, you can still use this time to go over the flow of the presentation, as well roles and responsibilities.

    – If possible, bring in your IT department for troubleshooting tips and have them on-call for the live session.

- Develop a Run-of-Show document. At this stage, it's important to have clarified the roles and responsibilities of staff supporting the event. It can be helpful to develop a Run-of-Show document to send out to all presenters beforehand. See the Run-of-Show Template in the Convening Toolkit to get started. The document should include:

    – Agenda with Roles and Responsibilities

    – Timing for each speaker

    – Logon info for the event

    – Any other information that would be helpful for presenters and other key event staff

There a few key tasks that are important in the days leading up to your event.

1. **Make sure to add a 30-minute to one hour early logon on presenters' calendar invite. This extra time will help address any technical difficulties that may come up before presenters go live.**

2. **Send out an event reminder to registrants between a week to a couple of days before the event.**

3. **Prepare and send out emails with logon information to all registrants.**
   a. Send out one email 24 hours before the event and another 2 hours before the event.
   b. Information to include in the email:
      i. Logon instructions
      ii. Any materials that will be used throughout the event
      iii. Guidelines and expectations for the event

Survey Resources

Feedback surveys can provide helpful insight into how you can improve your events in the future. There are plenty of resources out there already to help you get started.

- How to Write Great Survey Questions (and Avoid Common Mistakes)

- Questionnaire Design

- 15 Post Event Survey Questions to Ask at your Next Event

4. **Send the final Run-of-Show to all panelists/presenters.**

5. **Draft language for the Event Lead to use to kick off the meeting or webinar. Include guidelines and expectations for participants as well as any logistics reminders for the audience. A few key logistics include:**
   a. How participants should ask questions – chat box, raise a hand, speak up?
   b. When there will be a break and for how long.
   c. Remind participants to keep their microphone on mute unless speaking.
   d. Identify how participants can receive the materials after your event – will you email out the PPT before the session or send afterwards? Will you share the recording?
   e. Remind participants to fill out the survey at the end of the session.

6. **Prepare a feedback survey for participants to complete after the session.**
   a. Some virtual meeting platforms have a survey option that opens a survey after attendees close out of the session.

IX. Launching Your Event – Day of Event

The day of your event has finally arrived – enjoy yourself!

- Open up your event platform as soon as possible and get yourself situated.

- Presenters and panelists should join 30 minutes to 1 hour early to make sure there are no technical difficulties.

- If possible, have your IT department on-call to provide any last-minute technical support.

X. Event Follow-Up – 1 day after the event

The best way to improve future events is to get feedback as soon as possible and act on it quickly.

- After the event is over, set aside some time for the core team to review the event, survey responses, what went well and what areas could be improved for next time.

- Make sure to thank partners, speakers, and key staff for their participation and follow-up on any outstanding commitments that may have come up during your event.

- Follow through with attendees as well – send PowerPoints or other event materials.

- Make sure to take notes and save them for future use.

Tips on How to be an Effective Trainer

1. Preparation is key

Knowing both the material and the platform will ensure a smooth session.

2. Be ready for complications

No matter how much you practice sometimes you cannot avoid complications in the virtual space. Consider pain points in your training platform and be prepared with back-up plans.

3. Consider pre-session activities

This engages participants before they even enter the virtual platform and sets you up for continued engagement throughout the session. This could include watching a related video or filling out a poll about comfort level with the topic.

4. Greet participants

Logging on early is not only great for ironing out any technical difficulties but it also allows the trainer to greet participants. Greeting participants as they enter will help them feel more engaged and make a difference in how the event flows.

5. Avoid lecturing

It is especially easy in the virtual space to rely on the prepared materials, so try not to read directly from the materials. One tip to make this easier is to leave off details in the presentation so that you can build on them while you are presenting.

6. Practice sessions

Practice makes perfect! Do a test drive session before the event to get a sense of flow, rate, and pace of all planned activities.

7. Ask for feedback

Remember to not only ask for feedback on the content of the session, but also solicit feedback on your presenter skills.

Appendix I – Virtual Platform Options Advantages and Disadvantages*

1. WebEx – *Link to Plans and Pricing*

Advantages	Disadvantages
• Ability to host large-scale virtual events • Capacity of 3,000 • Easy to use from any device such as a laptop, phone, or computer • Free option available • Collaboration/interactive tools • Breakout rooms available • Recording available	• Internet Explorer default browser • System is a bit clunkier than some of the other options • Less intuitive • Free option only allows meeting length of 50 minutes with up to 100 participants • Limited customer support • Big learning curve • Connectivity issues

2. Zoom – *Link to Plans and Pricing*

Advantages	Disadvantages

• Ability to host large-scale virtual events
• Capacity of 500-1000 participants
• Screen sharing functionality
• Participants do not need to create an account
• Free version including:
  – Interpretation
  – Cloud recording
• Good customer service
• Stream meetings on social media
• Breakout rooms available
• Collaboration/interactive tools
• Auto-transcription
	• Highest paid option allows only 1,000 participants
	• Video quality can be unpredictable
	• Free option only allows meeting length of 45 minutes with up to 100 participants
	• Limited customer support
	• Subscription-based service with costs for add-ons can add up quickly
	• Zoombombing
	• Need to download an app

* These platforms are provided for informational purposes only, they are not endorsed by HUD.

3. GoToMeetings – *Link to Plans and Pricing*

Advantages	Disadvantages
• Affordable pricing • Easy screen sharing and logon • Between 150-3000 participants depending on plan • No meeting time limits • Works seamlessly with different devices • Auto-transcription	• Free option not available • Chat option is somewhat limited • Requires a lot of bandwidth (can be difficult to access using a hotspot or VPN) • Host cannot mute participants • Lack of collaborative options such as polling, whiteboard, etc.

4. Google Meet – *Link to Plans and Pricing*

Advantages	Disadvantages
• Free for up to 100 participants – Only 25 can use video • Simple to use if already integrated with Google Suite • Automatically displays speakers • File-sharing within a meeting • Easy screen sharing and logon • Breakout rooms available • Recording available (paid)	• Cannot mute participants • Need to have a Gmail account to login • Best for smaller groups, quality degrades with larger amounts of participants • Video/audio quality could be better • Harder to access outside of Google Chrome web browser • No transcript available • 1 hour limit on free meeting

Other Virtual Platform Options

☐ **Microsoft Teams**   ☐ **Streams.Live**

☐ **Adobe Connect**   ☐ **Free Conference Call**

☐ **WorkCast**   ☐ **Uber Conference**

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