

HOW TO
Plan and Deliver Successful Professional Development Events

NATIONAL CONVERGENCE TECHNOLOGY CENTER



How to Plan and Deliver Successful Professional Development Events

The National Convergence Technology Center (CTC), first funded in 2012 by the National Science Foundation, has successfully hosted dozens of professional development events for IT faculty and administrators from across the country. The most effective professional development events not only teach the newest technologies and industry trends, but also encourage networking and collaboration among attendees.

The CTC's professional development formats have been varied:

- 30-minute online webinars
- 30-minute lunch keynote presentations
- 60-minute multi-presenter "lightning round" online webinars
- Two-day multi-class workshop "summit" meetings
- Three-hour in-person conference workshops
- Three-day in-person events – multiple concurrent tracks
- Three-day online events – multiple concurrent tracks
- Five-day in-person events – multiple concurrent tracks
- Five-day online events– multiple concurrent tracks
- Five-day online events spread across multiple weeks (i.e., five consecutive Fridays)

This document has been prepared to assist you in planning your own professional development events, covering both the obvious essentials as well as more unique best practices the CTC has learned the hard way. For the purposes of clarity, this document will use the term "event" throughout, but understand that refers collectively to all formats, from 30-minute webinars to multi-day, multi-track training workshops.

The foundation of this "how to" came from a detailed process document created to explain how to plan and implement Summer Working Connections, the largest event that the National CTC hosted. Working Connections ran over five days each July and offered five to seven different tracks. Faculty attendees selected one track for a deep dive into that topic. Attendees taught that content at their home school, either by creating a new class or by supplementing an existing class. Immediate classroom impact was the goal.

OVERALL GUIDING PRINCIPLES

Consider these the cardinal rules of successful professional development.

- You can never be too organized, especially managing event rosters/RSVPs.
- Keep communication open with your team – host frequent planning meetings.
- It's okay to be an e-mail pest – you will likely need to send multiple reminders and check-ins.
- Anticipate possible problems proactively so you have time to deal with the ones you didn't see coming.
- Serve good food.
- Discourage no-shows.
- Measure not just immediate event feedback, but also long-term impact.
- Strive for continuous improvement – what could you have done differently? – and keep ongoing, living record of lessons learned.

PLANNING AND PREPARING

THE BASICS

☐ Select a date

- Send out "save the date" notices early via email even if the curriculum is not yet set. Publicize the end of registration date.
- Remember that if you're offering an online event, you can be more flexible with the schedule to accommodate more time zones (i.e., starting later in Central time may make it easier for Pacific time zone attendees, but more difficult for Eastern time zone attendees).

☐ Pick a format

- In-person, online, or hybrid?

- The CTC recommends avoiding concurrent online and in-person content. It is better to host your online event in one week, then you in-person event in another week.

☐ Book the venue

- Not just classrooms, but also lunch rooms and/or a “break room” space.
- Reserve any needed AV support, including power strips for attendee laptops, batteries for any remote controls, and microphones for larger rooms (don’t forget to factor in set-up time and technical testing).
- Determine the access process – who will lock and unlock the doors?
- If your event runs during the day, are there evening classes using your rooms?
- If it’s an online event, what video sharing platform will you use?

☐ Develop a budget and funding model

- Is the event paid for by a grant or will attendee registration fees support the event?
- If you’re collecting payment, understand your school’s internal process.

☐ Decide on meals

- If you plan to serve meals, find a caterer and get on their calendar right away if possible, even if meal details aren’t yet finalized.
- Good meals make happy attendees – try not to skimp on quality.
- Avoid box lunches if possible – they can be mushy and unappetizing (sometimes they even cost the same as a warm buffet).
- Accommodate vegetarians if possible.

☐ Address other planning questions

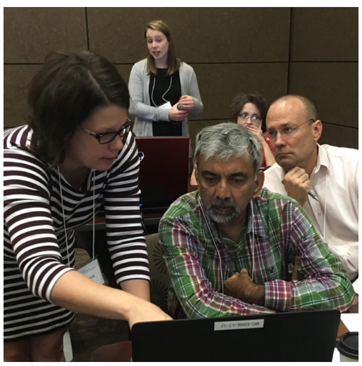
- How many attendees do you need registered for the event to make it worthwhile and when do you need to decide if it’s a go/no-go? (Note the concern of cancelling an event late in the process if people are making travel arrangements.)
- What criteria must attendees meet in order to attend? For example, CTC events often required that attendees plan to add the content into their program in the next 12 months. Specifically, the registration form asked “in the next two semesters, do you intend to teach or supervise the track topic you selected above either by incorporating into an existing class/program or be creating a new class/program?”
- How will you compel attendees to complete survey evaluations? (The CTC often removed those who didn’t do the survey from invite lists for 12 months.)
- Are there other, similar events like yours that might create competition?
- Are you duplicating the content of other, similar events?
- Are you offering travel expense support, and if so, how much? What are the criteria attendees must follow to get that support?
- Does your content support certification tests? If so, that should be made very clear. Understand also that some attendees may just want to learn the content without ever pursuing an industry certification.
- Are there any caps on attendance? (The CTC often limited the number of attendees that could attend from a single school to avoid any one school from monopolizing the seats – additional attendees could sign up later if space permitted.)

☐ Schedule frequent internal planning meetings with your team

☐ Offer topics that will support what your audience needs

- For the CTC, professional development events were always looking to align to in-demand workforce skills.
- There are several ways to select topics:
  - Ask a faculty leadership team.
  - Solicit suggestions from your BILT (employers).
  - Use attendee surveys. The CTC always asked a variation of "what topics would you suggest for future training events?" which then informed future events.

INSTRUCTORS AND GUEST SPEAKERS

☐ Identify possible instructor and guest speaker candidates

- Choose instructors carefully, and never hire someone unvetted.
- Use word of mouth recommendations from trusted colleagues.
- Vendor donations – some vendor academies are willing to donate teachers to help recruit colleges.
- Ask employers for suggestions – some may know technicians and executives who teach on the side.

☐ Finalize instructor payment logistics as soon as possible

- How much will you pay?
- Will you reimburse travel expenses? If so, which ones? You likely have to follow your college's travel rules.
- How will you make payments?
- No two arrangements are the same – understand your college's policies and processes.
- If you want to use an instructor from your own college, are there HR rules to consider?

☐ Gather essential promotional information to use to sell the content to attendees

- Title and description
- Bio and headshot
- Event objectives – what will the attendees learn (using Bloom's Taxonomy action verbs)?
- Daily agenda or outline
- Textbook needs (this is not as common as it used to be – most resources are available online)
- Determine any possible pre-requisites for the event – what do attendees need to already know?

☐ Collect essential logistical information from the instructors

- What do you need to make the event successful and when do you need it?
- Be clear on any deadlines for the information you need.
- Cell phone number (in case they're running late to class and you need to contact them right away)
- Specific classroom AV needs – for online events, what do attendees need to have installed or downloaded?
- Specific classroom supply needs (flash drives, dry erase markers, easels and tablets). Explain that college purchasing processes may not allow for quick buys if they show up and suddenly remember they need other supplies.
- What handouts might they need photocopied?
- Are they okay with you photographing – or recording silent B-roll footage – of their classroom? This is usually okay so long as you promise not to capture their presentation.
- Should attendees complete a short "skills assessment" in advance to better understand their level of skill and expertise with the topic? The CTC sent these out shortly after registration ended and the rosters were finalized.

☐ Clarify with instructors your expectations for the event

- When is the instructor expected to arrive and where?
- How long does the class/event run each day?
- What are the go/no-go rules? That is, at what point might the class be cancelled if not enough sign up?
- Are you comfortable with early dismissals if they get everything done early?
- What help does the instructor need to provide in taking attendance?
- If applicable, what are the travel policies and expense reimbursement rules for instructors?
- Are they expected to contact attendees prior to the event? (The CTC often asked instructors to send a "welcome" email one week before the event to open lines of communication and allow attendees to ask questions.)
- Do you want to schedule break times or leave it to the instructor? (The CTC often tried to coordinate break times at larger events so attendees from different tracks and workshops had a better chance of mingling and networking.)
- If there is a lunch hour, do you expect the instructor to attend? Sometimes they prefer to stay in the classroom and do work, which is something you to need to know if you're locking classrooms.
- Be sure to stay in the loop on instructor-to-attendee communications. This is especially important for online events. Unlike in-person events, there is no easy way online for you to address the sorts of questions or problems that always come up when a program

begins. Ask online instructors to always cc you on any correspondence they send to attendees.

☐ Consider a possible orientation meeting

- For longer, more complicated events, a formal orientation may be needed to spell out in detail your expectations for the event.
- This meeting will also give them a chance to ask you questions.
- Include screen shots of the paperwork they'll be using/managing so they know what to expect.
- While a live orientation is ideal, recording a webinar and sharing the link can also work.

REGISTRATION

☐ Invite the right audience

- Avoid needless confusion by only inviting people you know can attend – for example, CTC events were only for working community college IT faculty, so those invites didn't go to faculty from other disciplines.
- To further insure the CTC had the right audience, the registration form asked two clarifying questions "What IT/convergence classes do you currently teach or supervise?" and, as mentioned earlier, "In the next two semesters, do you intend to teach or supervise the track topic you selected above either by incorporating into an existing class/program or be creating a new class/program?"
- You could also ask attendees when they register to self-identify from a list of categories/job titles. You can also check their college website.
- The ultimate goal should be to develop an invitation list for the specific audience.

☐ Get organized

- If you're running an event with waitlists and have to track switching and complicated eligibility criteria, it's essential to stay organized.
- You need a living roster record that's updated daily during registration.
- For creating a registration form, Google Forms and Google Sheets are free and easy to use.
- Constant Contact is a paid service with the extra perk of allowing you to send reminder invites to those who did not respond to your first invite, called a "non-responder" email.
- The CTC exported Constant Contact registration lists to Excel, which was then used to keep meticulous notes. You won't remember in a week why this person got switched or dropped or why the person's question hasn't been answered yet; every attendee will have a "story" of their own. Keep track of that in case you need it later; otherwise, you'll be digging through weeks of old emails.

☐ Add to the registration form any attendee questions you need answered in advance

- Sample registration form questions:

    - Do they want CEU credit?
    - Do they want to ask for travel expense reimbursement?

- Do they work for a for-profit educational institution?
- What name do they want to use on their badge?
- What name do they want to use on their certificate of completion?
- Do they grant permission for you to use their name, college, and e-mail in an attendee directory?
- When you ask for their email address, be clear that whatever e-mail address they provide is the one you'll use to communicate urgent messages. In other words, participants should provide active e-mail addresses that they check often, even when they are not on campus or on contract.
- Do they want a vegetarian meal if available? Be sure to also ask instructors also.

☐ Launch registration only when you're ready

- Make sure all of the details are finalized.
- Plan to launch at least 3-4 months prior to the event as attendees may need to gain college approvals.
- In your invite email or letter, put the RSVP link as close to the top of the message as possible.
- If possible, have the invite message come from a person the recipients know.

☐ Be prepared to manage a waitlist

- Popular topics sometimes can't accommodate everyone who's interested, and some who sign up will drop out.
- Keeping track of who's on the waitlist, when they went on, and who gets moved off when space opens up can get confusing quickly if you're not organized with your roster.
- One good way to shake loose some attendees is to send a reminder one week prior to your cancellation deadline. Usually, a few who wanted to attend now can't attend, so they'll drop to make room for your waitlisters.
- As classes fill and you create waitlists, be sure to adjust your event website and/or registration form so new attendees are clear on what's still open and what's now available only via waitlists.
- Be sure before your event starts that you "close the loop" for those stuck on the waitlist - that is, when registration closes and the rosters are finalized, let those who are still in waitlist limbo know that they're in line to get in but aren't yet seated in a track. This will help set expectations and make clear for those who think they're in but they're not.

☐ Close registration early

- Give yourself plenty of time to prepare for the event.
- You don't want to be still updating the roster while you're making final preparations. The CTC closed registration two weeks before the event start date.

☐ Send confirmation emails

- Don't rely solely on Constant Contact-style auto-messages as some email systems filter out Constant Contact emails.
- Send your own customized confirmation to each attendee that can also provide important reminders about cancellation dates, travel rules, or URL links to event information.

☐ Create pre-requisite acknowledgment forms for tracks relying on prerequisite knowledge

- To limit attendees not understanding (or heeding) more stringent pre-requisites, require them to sign an acknowledgment form before confirming their registration.
- The CTC created a free Google Form that restated the pre-requisites and asked the attendee to acknowledge "on the record" that he/she has read and understood all of them.
- Mention this form in your email confirmation. If they don't complete the form, send them reminders until they do.
- In some cases, you might also want to create a shared Google file to track the attendees' compliance with the prerequisite form so the instructor can see it in real time as well.
- You could create a short orientation video to explain prerequisites.

COMMUNICATION

☐ Build an event website

- Attendees need a destination to learn more.
- Offer specific details on:

    - logistical elements (event location, schedule, campus map and address, parking details, local hotel options, travel reimbursement rules, taxi/shuttle contact numbers, lunch menus)
    - curriculum elements (track specifics and abstracts)

- Explain in detail on the website what participants must do to earn a certificate. For the CTC, the only way to get a certificate was to attend every session and sign every attendance sheet for both morning and afternoon.

☐ Be a pest

- Send frequent, proactive reminder messages.
- The CTC sent up to four emails to each attendee for larger events:

    - Initial confirmation email
    - Hotel block deadline reminder
    - Cancellation deadline reminder
    - Final check-in one week out

- For online events, CTC attendees also got one final reminder (with log in details) on the first morning.
- You may need to send the invitation out more than once. If you do, adjust and rewrite the invitation copy so it isn't an exact duplicate
- Stay on your attendees' radar through frequent communication.

☐ Anticipate questions

- What would you want to know if you were attending?
- The CTC's final check-in email (which went out a week prior to the start date) included:

  - Welcome letter from the event organizer
  - URL link for event information
  - Campus map
  - Building floor plan to direct attendees to their classroom
  - Agenda for the week (see Resources on page 32)
  - Reminder of survey requirements
  - URL link for any orientation videos (see below)
  - Lunch menu (see Resources on page 32)
  - Other applicable reminders, like information on a happy hour event (for the CTC, these happy hours were often funded by vendors; others were funded by attendees).

☐ Create an orientation webinar

- Attendees at longer events may need more extensive instructions.
- Not everyone reads emails, but some will watch a 7-minute video.
- It need not be complicated; a simple Zoom recording of PowerPoints slides with narration will work.
- The CTC typically created a general overview orientation video and also a separate video that just covered travel expense reimbursement procedures and rules. In 2022, 43% of attendees (out of 93 respondents) found the webinar helpful.
- Even if a few people watch the video, that could help proactively answer a dozen questions you won't have to deal with during your event.
- These videos should be ready to go when you launch registration; as mentioned, the link to the video should be in the confirmation emails.
- You may also want to include in the video a quick tour of the event website to remind attendees that many questions can be answered there.
- The general video could be shown to everyone at the start of the event, either in the classrooms or as part of some sort of welcome event.
- If you wanted to get more insistent, you could make watching the video (or perhaps passing a short quiz and signing an online acknowledgment form) a requirement of attending the event.

TECHNICAL SUPPORT

☐ Do as much as you can before it starts

☐ Be ready for the first day

- For in-person events, make sure the classroom PCs are properly configured; even after you've relayed instructor requests to technical support staff, go back the week prior and make sure the instructor has no additional requests.
- For online events, encourage attendees to have their home computer properly configured (including a test of whatever video platform attendees will be using) in advance.
- The first morning of longer events are often sidetracked with technical and logistical issues – do what you can to minimize as much of those as you can.
- You can't anticipate everything, but you can remind everyone to be as ready as possible
- It's not fair when those who prepared have to wait for those who didn't prepare and use valuable class time to get properly organized.

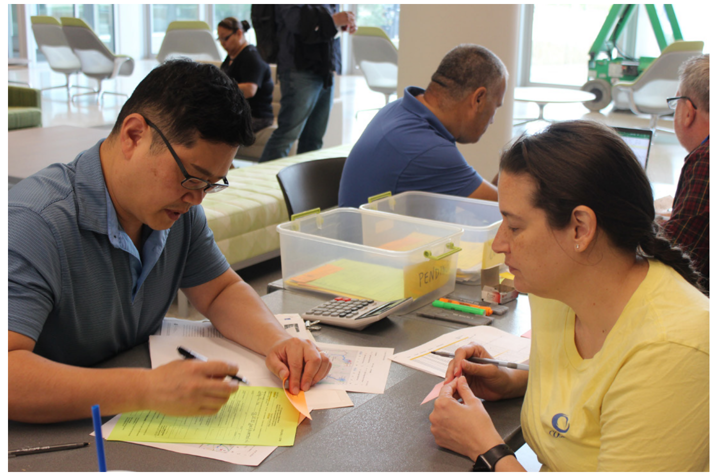
DISCOURAGE NO-SHOWS

- ☐ Publicize your deadline
    - What is the last day an attendee can switch tracks or cancel? Make sure that deadline is repeatedly and clearly communicated – on the website, in emails, in any orientation video.
- ☐ Consider ways to minimize no-shows
    - You've paid for lunches and classroom resources; you've turned away people on your waitlist; you've created welcome packets. When an attendee just doesn't show up, this is a concern for events that are otherwise free to attend.
    - The CTC emailed the attendee's supervisor (and cc'd the attendee) to let him or her know that the attendees has signed up for the event and spelled out the 12-month "no invite" consequences for dropping out after the deadline without providing a substitute.
    - Other events charge a small registration free to get "skin in the game" to encourage attendance.
- ☐ Develop substitute policy if applicable
    - The CTC allows someone who does cancel to send a substitute, but there are guidelines for this sub:
        1. That substitute has to attend the entire event - no partial substitutes (that is, person A can't miss the first two days and send person B to take his place for the rest of the event).
        2. That substitute must be approved. The idea is that the sub must follow the same criteria as the person he/she is replacing (i.e., the sub goes through the same registration form and answers all of the registration screening questions).

CEUs

- ☐ Decide if your host college would like to offer CEUs
    - Some attendees find extra value in receiving Credit Equivalency Units and appreciate receiving them.
- ☐ Develop a process for awarding the CEUs
    - What are the qualification criteria? For the CTC, attendees can only receive CEUs if they attend every class – no absences are permitted for any reason.
    - Does everyone get CEUs if they qualify or do you want to collect request forms?
    - Some schools require enrollment in their student system to get CEUs on transcripts; other schools are okay simply tracking attendance in spreadsheets

TRAVEL REIMBURSEMENT



☐ Determine if you can reimburse attendee travel expenses

- Reimbursing travel expenses will help encourage attendance. Typically, travel reimbursement is provided through a grant, not through the hosting college's budget.
- To determine demand, you can survey possible attendees in advance.
- You can also add a question in the registration form – "If available, would you want to request travel expenses be reimbursed?"

☐ Develop your reimbursement policy

- Your college likely already has travel expense rules in place, which you'll need to follow.
- Some questions to consider:
    - Which categories of expenses will you reimburse?
    - What sort of receipt backup will you need to provide the reimbursement? The CTC wants receipts with proof of payment, not reservation emails or airline itineraries.
    - How far away (in miles and/or commute time hours) does someone need to live to qualify? The CTC reimbursed nothing if someone lived an hour or less away.
    - How much time do attendees have to submit their paperwork?
    - What's the latest attendees have to buy airline tickets and how will you enforce this? The CTC printed itinerary pages off the internet for attendee cities on the last day they're allowed to buy plane tickets – that way, if someone bought a ticket after the deadline, the CTC had evidence of the price prior to the deadline.
    - Is there a per-night cap on lodging expenses?
    - Are you open to reimbursing someone who chooses to drive a long distance rather than fly?
    - Are you able to reimburse them directly or does the payment have to go to their college?
    - What is the overall cap on expenses per attendee?
    - How will per diem work? CTC attendees were only entitled to 75% of the per diem rate on their two travel days, which also excluded any meals the CTC provided on those days.

- Clearly and repeatedly convey this policy – in emails, on the website, in hard copy handouts.

- Be sure also to make attendees understand they're making a reimbursement request – it's not a guarantee; the final decision on payment will likely rest with your college business office.
- Attendees should also understand up front how long it will take for reimbursement check to be issued.
- You should also understand how your college handles expense reimbursements.
- Note also that the CTC separated attendees into different tiers of reimbursement based on their relationship with the grant – colleges in the grant's network had higher reimbursement caps:

    - First tier (based on participation and engagement) grant network members, travel capped at $1200
    - Second tier (based on participation and engagement) grant network partners, travel capped at $750
    - Everyone else, travel capped at $300

- Another travel model to consider is offering attendees a flat stipend (rather than itemized expense reimbursements) based on how far away from the event they live.

☐ Create reimbursement request forms (See Resources on page 32)

- Attendees submit a signed form along with their travel expense receipts.
- Be very clear on the form where attendees want the payment to go – to them personally or to their school.

☐ Host an "open house" period during your event to answer questions and collect request forms.

- On the last day of longer events, CTC staff made themselves available in the event break room during the morning break time to answer travel questions and receive expense request paperwork.
- To reduce possible bottlenecks at the open house, assign specific attendance times that are staggered for one class at a time.
- Be sure to have handy multiple copies of the "master" attendee list so you can make notes; this will help you keep track of what's been submitted and what's pending. Be aware that everyone will have a different situation, and attendees may ask for exceptions to the travel rules. Consistency for all is important.
- Arrange to have access to a photocopier should attendees need to make copies of receipts; alternatively, ask them to take picture of receipts with their phone.
- You may decide to not accept incomplete expense packets; sometimes, attendees haven't yet checked out of their hotel so they don't yet have a hotel bill, for example.
- For the CTC's larger events, two to three people at tables answering questions and accepting paperwork worked well.
- In addition to the tables the staff needs, you may want a few extra empty tables available for attendees who need to step out of line and fill out paperwork.

HOTELS

☐ Identify suitable local hotels

- Do they offer a free shuttle to campus for those without cars?
- Do they provide complimentary hot breakfasts so you don't have to feed attendees?
- The CTC always capped the amount per day for hotel charges; this left attendees with the choice of where to stay.

☐ Arrange a discount block, if possible

- Avoid booking hotel rooms and paying for them directly as attendees could decide not to attend, leaving the grant with charges for rooms not used.
- Hotels will often set aside a set of rooms at a discounted rate for a limited time; in this case, provide a booking link that attendees can use to make a reservation.
- Keep tabs on how many rooms are being booked; if demand is high, you may want to consider expanding the discount block if the hotel will agree.
- Make sure your discount block's dates align with your event dates and do not include extra days before or after. Some attendees will look at the hotel block and book the entire time period without comparing dates to the event agenda.

☐ Publicize the discount block

- Use your event website.
- Be thorough with your disclaimers:
    - Attendees are responsible for securing the discount rate and confirming it when they check out.
    - Disclose that all rates and the discount booking deadline are subject to change without notice.
    - Advise that the hotel discount rate is based on availability – so they should book early.

- Note also any state-based tax exemptions for educators. For the CTC, Texas educators were exempt from certain state hotel taxes, and the CTC could not reimburse those state taxes per the Collin College travel policy.

CATERING

☐ Set the lunch menu early, and expect attendees to eat breakfast at their hotels

- Pay attention to your school's per diem or other spending limits for lunch.
- Balance the need to appeal to everyone with the need to avoid monotony. Chicken is a safe choice, but people will notice if every meal you serve is a chicken dish.
- When you publicize the menu, if applicable, add a disclaimer that no special diet/food substitutions are possible with the exception of those who specify the need for vegetarian food.

☐ Place the order

- Be specific on when you want the food delivered, and err on the early delivery as when caterers are late, the day's schedule is thrown off.
- It is a good idea to include tablecloth linens in the order unless you have them.
- Confirm the deadline for changes in catering; keep careful track of RSVPs and headcounts so you can update the number of meals in the order.
- You may want to add 1 or 2 to the final number as a contingency.

☐ Be prepared to manage leftovers

- This could be bringing in containers or it could be inviting support staff to come after your attendees have eaten.

ONE WEEK OUT

☐ Check in with attendees one last time (seven days prior to the event start date)

- Do they know where to go on that first day and at what time? For online events, this includes directions to log into the video platform.
- Do they need a map?
- Do they need final event schedule?
- Always offer to answer any final questions or concerns in advance.

☐ Check in with instructors and lunchtime keynote presenters one last time (seven days prior to the event start date)

- Do they know where to go and at what time?
- Do they need a map?
- Make sure they have your contact information and they have yours, especially cell phone numbers in case there's a problem.
- Are there any final additions or changes to their needs?
- Always offer to answer any final questions or concerns in advance.

☐ Check in with your caterers one last time

- Confirm the final headcount again.
- Do you need to see a revised cost estimate?
- Do they know where to go to deliver the food and at what time?

☐ Double-check any classroom reservations one last time

- Can your venue still accommodate your final headcount per class?
- Make sure your reservation is still officially on the books and you haven't been bumped by another event.

☐ Understand details about classroom technical support

- How will attendees and instructors log into the classroom computers?
- Is guest wifi available? Will they need a username and password?
- Can software and files be stored on the classroom computers overnight?
- Also remember to keep in mind if there are evening classes in your rooms; in that case, it is safer to have attendees take all their belongings each day and to not use classroom computers for storage.

☐ Print and assemble your registration welcome packets

- Provide hard copies to attendees (and instructors) when they arrive on the first day.
- Virtual attendees can receive electronic copies of packet information.
- For the CTC, a lot of what went into the registration packet matched what was sent out in that "one week out" check-in email also, but from experience, having hard copies limits the number of unneeded questions.
- Maintain a consistent style and format branding for all of the materials you provide attendees.
- Packet contents can include:

    - Welcome letter
    - The week's agenda
    - Attendee directory (ask permission first)
    - "Save the date" postcard for a future event
    - CEU request form if applicable (you can also ask if attendees want CEUs when they complete the registration form)
    - Travel expense reimbursement forms
    - Lunch menu listing

    - Campus map (with campus address) and building floorplans
    - Local restaurants map
    - Campus wifi password – which can also be slipped into the badge holder on a small slip of paper also
    - Attendee activity flyers

- Name badges can be clipped to the outside of the packet. Always proof them, even if you mail merge to print them.

☐ Run a technical test of any video sharing platform

- If you're hosting a web event, take time to schedule a quick system check with your instructors and presenters using your video platform to be sure everything works and everyone understands the plan for using the video platform.

FINAL PREP

☐ Create a supply box for items you may need during the week

- Disinfectant wipes
- Power strips
- Markers
- Clear Scotch tape
- Larger clear strapping tape
- Heavier duct tape (in case you need to tape wires and cables to the carpet – red is better for visibility)
- Extra doorstops
- Dry erase markers
- 2-gallon Ziploc baggies (you may have lunch leftovers even after staff have eaten)

☐ Conduct a "walk through" meeting with your staff, going through the schedule day by day

- Do what you can now to anticipate possible problems and challenges.
- Make sure everyone knows what they're doing and when and where – including arrival times.

☐ Assign a photographer to document the event

- Group photos are good if you have multiple classrooms or tracks.
- Also take smaller posed and candid shots for use on your websites or in your presentations.
- See page 23 for more information on photo release forms.

☐ Prepare any announcement scripts

- As part of shared meals, you'll want to make housekeeping announcements and reminders.
- Be clear on who's making which announcement and also on who's introducing which

keynote presenter if applicable.

☐ Set up an event “staging” space

- Get your refreshment supplies and registration materials as close to the venue as possible so they’re handy on the first day.
- Is there a storage closet that you can borrow during the event?
- You can also set everything up in advance if it won’t interfere with other events. For example, the CTC reserved the break room over the weekend so it could be set up on the Friday before a Monday start.

☐ Invite VIPs

- Are there any college VIPs that should attend a portion of the event?
- VIPs can welcome the group on the first day or say goodbye on the last day.
- If VIPs attend meals, be sure to add them into the headcount.

☐ Hang signs outside classroom doors identifying the track title

- This will help attendees find where they’re going, especially on the first day.
- You may also want to also tape signs (and maps) on the entrance doors of your venue.
- Think also about whether someone might go to the wrong building. Do those entrances need signs as well to point people in the right direction?

☐ Prepare event “run sheets” for instructors (See Resources on page 32)

- This reference document can help them answer basic questions from attendees.
- You can make one for the entire event or individual run sheets for each day.
- These could feature:
    - Daily schedule with times and room numbers
    - URL for the event website
    - Quick reminder about attendance rules
    - Campus wifi log-in information
    - A summary of the day’s key activities, including lunch menu, lunch keynote topic and presenter bio, and/or survey deadlines
    - Any logistical reminders, such as directions on locking classroom doors or food/drink rules
    - Social media hashtags
    - Your contact information

HOSTING

IN-PERSON CHECK-IN

☐ Welcome the attendees

- Keep the check-in process streamlined. For example, don't slow the line by asking participants to sign release forms for photo or video usage.
- For the CTC, attendees signed the attendance sheet, picked up their packet, then headed to the classroom.
- You may also want to set up two stations based on last name (e.g., A-L and then M-Z) so you can process two attendee lines at a time.
- Have plenty of pens on hand at check-in and be prepared to let them walk off – for this reason, branded pens are ideal.
- A branded tablecloth will look nice on the check-in table, but it is not required.
- For larger events, color coding the name badges by track can help attendees recognize one another and stay organized.
- Put signage (maps or arrows) on the check-in table to help point everyone in the right direction for their classrooms.

☐ Consider social distancing stickers

- To help attendees navigate a post-COVID world, you can offer colored stickers to put on their name badges (red = stay six feet away, yellow = elbow bumps only, green = hugs are okay).

☐ Be ready for "walk ups"

- Will you let someone in who's not on your list? Have that conversation in advance just as a contingency so you're not taken off guard when it happens. The best solution may be to simply offer a seat in a track that has room, but they should not be allowed to get a seat into a closed/full track.

☐ Prepare for latecomers

- If check-in is over and you're still waiting for a few latecomers, you can either:
    - Leave someone sitting at the registration table.
    - Set up a sign directing latecomers to come to your office to sign in and gather their registration packet.

☐ Plan for badge recycling

- Plastic name badge holders and lanyards can be recycled for your next event. Put a basket in the break room on the last day of the event and ask for the badge to be returned. A handful of people will turn them in.

LUNCH CONTENT

☐ Decide on a format – NSF-funded meals need to be "working meals" with a program element

- Keynote presentation with a single speaker
- Panel discussions – faculty always likes to hear from employers
- Lightning round series of short presentations whereby each speaker gets just five minutes and 15 PowerPoint slides that advance automatically every 20 seconds
- Birds of a Feather roundtables whereby each lunch table focuses on a single topic. Participants discuss the topic as a group by table, then submit their collective answers for sharing.
- The CTC typically allows the attendees 15-20 minutes to eat before the program begins. Lunch started at 12:00pm, and the lunch presentation began at about 12:20pm.

☐ Be ready for attendees to ask for a copy of the featured slide deck

- Ask your presenter in advance if he/she is willing to share a PDF of their slides.

☐ Conduct an AV system check with your presenters prior to the lunch start time

- Ask your presenter to arrive early to meet you. Usually 15 minutes early works.
- Ideally, the presentation can be run from your laptop (on which you'll also have your announcement slides). That way, you can avoid the fumbling of switching out laptops during the lunch program. This requires you to ask for the presentation in advance.
- Remind your presenters to stay "on mic" and on time during the program so everyone can hear them and the lunch session stays on track.

☐ Deliver housekeeping announcements and reminders before dismissal

- What do the attendees need to know?
- This is a good time to offer reminders about surveys or travel reimbursements.
- If your classrooms are being used in the evening, don't forget to remind attendees to take everything when they leave for the day.

☐ Plan in advance who will introduce the presenter

- Provide that person with a short bio.
- That same person can also give the presenter a “thank you” certificate. Also be sure to get a photo of that moment.

☐ Use any screens in the room used for lunch for additional content

- You can run a PowerPoint slide show on lobby TVs or lunch room screens.
- Show event photos or deliver reminder housekeeping messages.

SERVING THE FOOD FOR LUNCH

☐ Determine serving logistics

- Beware of letting attendees serve themselves. You want to maintain portion control so those at the end of the line aren’t without. This concern mostly affects proteins and desserts.
- Running two sides of a buffet moves everyone faster.
- You may need to ask for extra, larger trash cans to handle all of the lunch trash.
- On the first day, you may also want to assign someone to help steer and guide everyone to the lunch venue when the morning classes end.

☐ Accommodate vegetarians

- Ask attendees on the registration form if they’d prefer a vegetarian meal if available (don’t forget to also ask instructors since they won’t be registering).
- To avoid confusion, make sure the vegetarian option is set aside on a different table with high visibility signage (maybe offer a “last chance” reminder two weeks out asking for their final decision on vegetarian options).
- Proctor that vegetarian side table so only those who asked for it in advance get it until all are served.
- Consider adding a leaf or a “V” icon onto name badges so the proctor can easily identify the vegetarians.

☐ Understand how your caterer handles headcounts

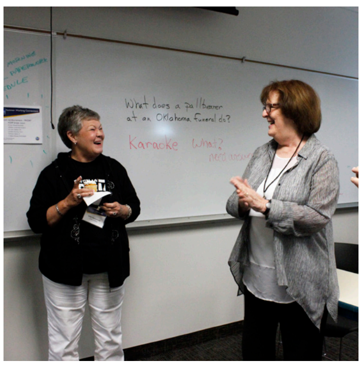
- Do they add 10% more food as a cushion or do they provide food just for the number you provide? Some menus provide more leeway than others. Entrees that include a single piece of protein can be problematic without proctoring.

☐ Follow college rules on how your college handles gratuity

- The CTC was allowed to authorize a 15% gratuity.

BREAK ROOM

☐ Publicize the break room




- Post clear signage, including campus maps if needed.
- Make clear on the event website the parameters for using the break room to better manage expectations. The CTC typically served only hot coffee and ice water for the morning break; afternoon breaks offered modest snacks like chips or cookies in addition to the coffee and water.

☐ Make the break room available all day if possible

- Leave the door unlocked during event hours.
- Start the coffee early in the morning so it's hot and ready to go 30 minutes before the morning class.
- Turn the coffee off an hour before the afternoon class ends.
- Prep the coffee in the afternoon for the next morning so that all you have to do is turn it on.
- If no one is using this "break room" in the evenings, leave everything set up overnight with the door locked. If the "break room" is used, lock up leftover equipment and snacks.

☐ Stock the break room

- Hot coffee and iced water (either chilled bottles or dispensers with spigots).
- An electric kettle and tea bags will be appreciated.
- Set out snacks only in the afternoon (e.g., chip bags, fruit, popcorn).
- Be sure to plan for how to handle the coffee. Investing in large urns is a good idea, especially if you can have two (one for the morning and one for the afternoon.
- You may need extra pitchers to help fill the coffee urns with water.

- Don’t forget coffee “fixings” like napkins, cups, sweeteners, and stirrers.
- Keep an eye on the water and coffee levels throughout the day, and add water or make more coffee if the supply starts to get low.
- You’ll soon get a handle on the attendees’ consumption rate and can anticipate needs.
- If you’re using store-bought coffee grounds, keep an eye on the expiration date.
- Until the coffee is ready, put an inverted cup over the spigot with a note “Ready at 8am” so people know the coffee is still brewing.
- Another beverage option is to provide attendees with a giveaway cup, and then make available a cooler of ice (with a scoop) and some lemonade or ice tea powder. Attendees can fill their cups at the water fountain or make drinks if they so choose. This approach is less expensive than paying for two bottles of water a day for every attendee, especially if a vendor will donate the cups.

☐ Make use of the white board (assuming your break room is in a classroom) for further messaging

- Write a nice “welcome” on the first day.
- Repeat the lunch announcements on the white board in the afternoon.
- Attendees can also use the board to communicate with one another for such things as scheduling carpools or arranging evening social events.
- For online events, you can use a messaging system like Slack.
- Be sure to publicize whatever method you choose to use for attendees to communicate with one another.

ACTIVITIES

☐ Plan a social event, if possible



- This need not be elaborate.
- Reserving a private room at a local restaurant/bar for happy hour can be enough. Let the participants pay their own way and set up their own bar tabs; all you’re doing is booking a private space and then letting everyone know where to be and when.
- Be sure to set expectations for this sort of event– e.g., there is no special transportation so people will either need to call a cab/rideshare or catch a ride with one of the other attendees.
- The CTC has also had luck with corporate sponsors covering the cost of limited happy hour drinks and appetizers from time to time.
- You can also arrange a tour of a relevant local business or industry, but that will likely

make you be more involved in arranging transportation and other logistics as well as costs.
- If you can get volunteers, encourage your attendees to take the initiative in organizing after-hours events, like a sporting event or karaoke night.

☐ Conduct lunch prize drawings if you can get donations to give away

- The prizes usually need to be donated as federal funds usually cannot be used for drawing items.
- This can be something as simple as branded plastic cups or something as elaborate as a vendor-donated prize.
- Avoid the term “raffle.”
- How will the drawing work exactly? Will it be a door prize where everyone gets a ticket for a drawing (in which case a good way to distribute tickets is to slide one inside the back of each name badge)? Or will it be tied to a specific track goal, such as everyone who passes a test gets the item?
- For the CTC, one person called out the ticket number at the end of lunch while a second person walked the prize out into the crowd.
- Prize drawings help keep people from leaving early. The prize isn’t awarded until the very end of the event or session.
- You can do prize drawings for online events if you’re willing to mail the prizes, but is a lot of trouble.

☐ Host other activities

- The CTC has had success engaging attendees with other simple activities to promote networking.

    - Selfie booths
    - Signing a white photo mat
    - Hiding a plastic toy each day and asking attendees to find it
    - Posing for photos with a sign or the school mascot
    - Making branded luggage tags out of attendee business cards
    - Playing “human bingo” for an icebreaker

SOCIAL MEDIA

☐ Promote hashtag use

- Identify which hashtag you want to use, being sure to first research whether the hashtag you prefer isn’t already being used.
- Encourage attendees to use that hashtag and make postings about your event.
- Consider offering a prize to the attendee who posts the most hash-tagged content, if possible.
- Ask attendees to provide their own hashtags in advance, perhaps when they register, so it’s easier during the event to quickly tag posts and use handles.

☐ Create a list of photos you want your photographer to take

- Include both still photos and silent B-roll video footage requests.
- Instructors are usually fine with silent clips of the classrooms so long you don't record the screens.
- Be sure to get candid shots as well as posed group shots.

☐ Record lunch presentations and webinars

- If the presenter agrees to it, you can repurpose that content as shareable YouTube clips to further disseminate it.

OTHER HOUSEKEEPING

☐ Manage sign-in attendance sheets

- Keep track of who attends the morning and afternoon sessions.
- Create a roster list per class and ask that it be passed around so everyone can initial it both mornings and afternoons.
- Attaching the sign-in sheet to a clipboard makes it easy to pass around and harder to lose.
- Collect the sign-in sheets at the end of every day, and set them out again in the morning.
- If you want to be strict about limiting attendees' ability to at some later time claim attendance at sessions they didn't attend, you can take photographs of the sheet each morning and afternoon or "X" out blank squares each day.

☐ Collect photo release forms

- Photo releases are necessary if you are planning to publish photos or post video.
- You should also get instructors and lunch speakers to sign release forms.
- For the CTC, Collin College's release forms were good in perpetuity, so the CTC only needed to have "new" people sign them. In those cases, check first to see whose signatures you already have so that you do not bother them with repeating the release form.
- Verify that you have all of the releases signed before the event ends as it's much easier to track someone down to sign the form in person than after the fact via e-mail
- In case someone asks, be able to explain your intended use for the photos and videos.
- Mail merge the attendee data so each release form is already pre-printed and personalized with the name, address, and date.
- There are three ways to collect release forms:

    - You can clip the needed release forms to the registration folders so they sign as soon as they check in – you can also staple a high-contrast (i.e., pink or yellow) explanation sheet to the release form.
    - You can hand the needed release forms to each instructor and ask for his or her help getting them signed and returned.
    - You can manage this "manually" and just go room to room getting them signed as needed.

☐ Make yourself visible

- Visit each class throughout the event and speak to the instructors and the attendees as often as possible. The CTC tried to be particularly visible in the mornings as attendees arrived and then during the afternoon breaks.
- When you're walking around the event away from your desk, attendees will have questions, so be ready with appropriate reference material. Carry a roster of attendees, both alphabetical and also sorted by class/track, as you circulate. Also have with you a detailed agenda of what's happening where and when, along with essential contact numbers (caterers, technical support, campus facilities).

☐ Keep a record of problems or questions that arise

- Learn from your mistakes and adjust procedures for future events

WRAPPING IT ALL UP

SURVEYS

☐ Offer an anonymous suggestion box

- Consider placing an anonymous suggestion box in the break room to supplement the official, more formal surveys.

☐ Prepare first day surveys

- The "first day" surveys look for quick fixes to allow for adjustments early in the week. These surveys don't need to ask a lot of questions.
- Ask attendees to fill it out after lunch on the first day, then share the anonymized results with the event instructors. If you do it early enough in the week, there's time for small corrections, if needed based on the feedback.
- This approach may not be useful for shorter events.

- Ask attendees if:
    - The learning goals and objectives of the track are clearly outlined.
    - The track content includes relevant topics related to the subject.
    - The instructor provides adequate opportunity for students to seek clarification.
    - The instructor provides adequate opportunity to practice newly learned concepts, skills, and material.
    - The instructor is adequately prepared.
    - The instructor answers questions well.
    - The instructor demonstrates adequate knowledge of the subject.

☐ Prepare overall end-of-event surveys

- The final surveys are more comprehensive.
- The CTC tried to track the responses to ensure all attendees to provided feedback.
- Embed the survey links in the event website, preferably on a “survey” page. Don’t post it until the day of the survey to avoid people completing it early and providing uninformed responses.
- Anonymized results related to track-specific questions can be shared with the event instructors.
- Ask questions such as:
    - Was the content relevant?
    - Would you recommend the event to others?
    - How effective did you network with other attendees?
    - Did you experience change in expertise across specific class goals?
    - Was the instructor and the content well delivered?

☐ Consider steps to verify the surveys were completed by all

- Ideally, surveys are anonymous, but it is helpful to have the survey attached to the individual should you need to ask questions.
- If you want some way to track survey completion and make sure all attendees participate, work with your IR office to develop possible solutions.

☐ Publicize the surveys

- To insure participation, mention the surveys as many times as is possible: on the registration page, in e-mails, during lunch announcements.
- You can also help remind attendees to do the survey by writing the survey URL on the classroom whiteboards on the last day.
- For online events, send a survey reminder via email.
- For the CTC, attendees who didn’t do the end-of-event survey were taken off professional development invite lists for 12 months.

☐ Prepare longitudinal impact surveys

- These surveys go out many months after the training to measure long term impact.
- The CTC sent longitudinal surveys out 6 months, 18 months, and 30 months after the training.
- Specifically, the CTC surveyed the prior three Working Connections cohorts (e.g., the January 2023 survey contacted attendees from the July 2020, July 2021, and July 2022 events).
- The questions cover what attendees did with what they learned and included items such as:

  - How did attendees implement the material in the classroom?
  - How many courses/students were taught from the material learned at a given professional development event?
  - How many new degrees/certs were created as a result of learning the material?
  - What was the event's impact on attendee industry awareness?
  - What was the event's impact on networking/collaboration?
  - What was the event's impact on classroom strategies?

CERTIFICATES (See Resources on page 32)

☐ Develop a certificate policy

- Who qualifies to get a certificate? As mentioned, for the CTC, the only way to get a certificate was to attend every session and sign every attendance sheet both morning and afternoon.
- Be sure these rules are published on your event website.
- Also create in advance a "sick policy." How much can an attendee miss for legitimate reasons and still get a certificate? The CTC allowed a person to miss a single half-day session for an excused reason and still get a certificate.
- You can also adjust the descriptive wording on the certificate from a strong "successfully completed" to a more generic "participated in," which may be preferable for online events where attendees may or may not be fully engaged.

☐ Print the certificates

- Proof them after they're made, and remember you may have specifically asked them when they registered what name to use for the certificates.
- You can pass them out in person on the last day (either informally in the classroom or with a more formal closing ceremony) or create PDFs to email later rather than printing them.
- If you are offering CEUs, an easy way to "award" them is to add a single line on the certificate specifying the number of CEUs.
- Don't forget to give certificates of thanks to your instructors and guest presenters. The CTC recognized lunch speakers immediately when they completed their presentations; Thursday's lunch featured recognition of all instructors.

LESSONS LEARNED

☐ Debrief and discuss as a team what you could have done differently

- Create a “lessons learned” document that summarizes what worked, what didn’t, and how you can improve things for next time. Use your detailed list that you developed throughout the event to create the “lessons learned” document. The document you create can be referenced for the next event, and you can add to it after each event.
- Strive for “continuous improvement.”
- Some examples of unexpected “it’s always something” issues the CTC has had to deal with, all of which went into “lessons learned” documents, are:

  - Classroom door badges didn’t work.
  - Attendee showed up who didn’t register.
  - Attendees didn’t like an Instructor and were vocal about it.
  - Attendee brought his grandson, and having youth on the campus is not acceptable due to insurance requirements.
  - The instructor didn’t specify what he needed in the classroom until Monday morning.
  - Catering problems such as late delivery or missing food occurred several times over the 21 years that CTC offered the week-long version of professional development.

OTHER WRAP TASKS

☐ Make sure vendors get paid

- Become familiar in advance with your school’s accounts payable process.
- Pay particular attention to handling travel expense reimbursements right away, since those are often your attendees’ out-of-pocket expenses.
- If you make any changes to travel expense reimbursement request (i.e., you deny one of their requests or the math is incorrect), let that person know as a courtesy if at all possible. Recognize, though, that people often do not read the travel policy rules.

☐ Send a “thank you” email late in the afternoon on the last day

- Thank attendees and instructors for attending.
- Remind them of any surveys.
- Reiterate travel reimbursement rules and deadlines. Be firm that requests received after the deadline will likely not be able to be honored.
- Share any materials such as lunch presenter slide decks or links to a photo gallery.

☐ Contact the no-shows

- If you’re going to remove someone from an invite list for a “no show,” first politely give them the chance to explain their situation so that you can determine if their absence is excusable.

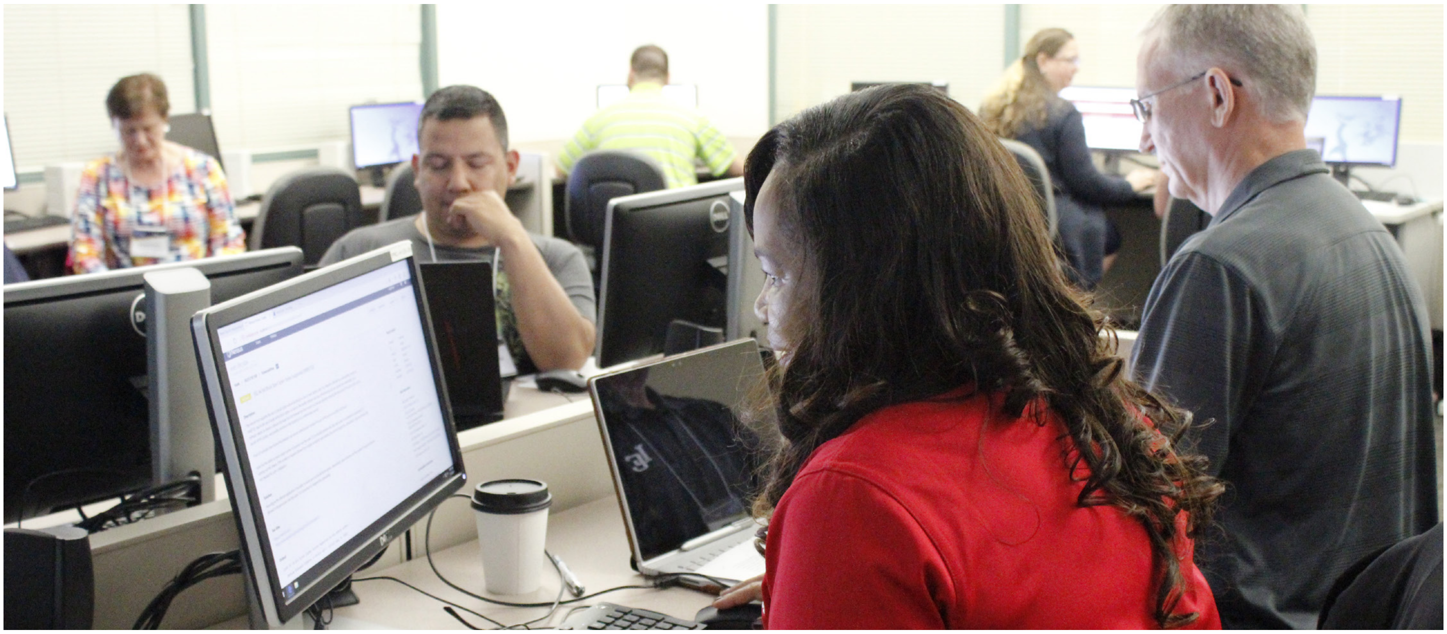
☐ Archive event paperwork

- You can file hard copies in a three-ring binder or you can scan paper copies and file everything electronically.

- Include email invitations, event web pages, handouts and registration materials, hotel block contracts, instructor contracts, travel reimbursement forms, completed sign-in sheets, catering paperwork, room set-up paperwork, survey results, and lessons learned.

☐ Update your distribution lists for next time

- Attendees should be added to your master invitation list for future professional development events.
- Instructors with good reviews should be added to a list of instructors for future reference.



ONLINE EVENTS

The term "instructor" is used in this section, but these practices can also apply to shorter online webinar-style events with more informal presenters.

☐ Vet your instructor

- Be sure your instructor knows how to teach online as what works in the classroom may not work online.
- You could ask him or her to provide a preview of the first online lesson.
- Also be sure the instructor knows how to use your web-meeting software if you're hosting the event.

☐ Send final email reminders

- On the first morning of an online event, send everyone an early morning reminder of the event start time and web platform log-in details.
- You may also want to send that information via an Outlook-style calendar appointment one week prior to the event.
- For shorter webinars, send an email reminder (with log-in directions) one hour before the

start time.

☐ Standardize attendance processes

- At in-person events, it's easy to look at the room and see who's missing and allow latecomers to sign the attendance sheet when they arrive. Checking attendance isn't as simple for online tracks; instructors may call roll one time in the morning and one time in the afternoon prior to focusing on the instruction. Latecomers might not be noticed.
- Possible strategies to help keep track of attendance:
    - Give the instructors an assistant to help monitor attendance; monitoring attendance could be something you do for them.
    - Ask instructors to call roll more than once in each session.
    - If the session is being recorded, have attendees type their name into the chatbox.
- Make clear in advance that attendees must be proactive with attendance; if they're late and miss roll call, they need to speak up to be sure they're marked "present."

☐ Minimize cybersquatters – control who gets in

- Find a way to restrict access to the online event to only those who register.
- Make clear on the website that the track is intended for registrants only – no "link sharing" is permitted.

☐ Preparing attendees for online events

- Make clear in the event description this is a synchronous event. Everyone is expected to log in for the duration of the event.
- Demand attendees be proactive with questions and concerns prior to the start date. Attendees are not using classroom PCs pre-configured by campus technicians, so they will need to take responsibility for making sure their system is ready.
- Attendees need to read the prerequisites on the event website page, review email messages and directions in advance, and follow up with the instructor if they have questions or suspect they didn't get an email.
- Insist that attendees test the web platform in advance of the event. That gives everyone a chance to work out kinks and minimize problems that may arise on the first day of the event. Most platforms have free "test" features to check compatibility.
- With everyone participating remotely on local machines, you could identify a uniquely qualified "host" among the event attendees that could help troubleshoot technical problems so it doesn't all fall solely on the instructor (who's busy) or the user (who's likely frustrated).
- If the instructor uses his or her web platform, be sure you're kept in the loop on dial-in directions as you may be asked for help.
- In general, there is no such thing as "overkill" when it comes to pushing out dial-in information for web platforms – e.g., an Outlook session invite (with Zoom info) the night before and also the morning of the session.
- Remind everyone about time zone differences. Despite the word "Central" appearing alongside every time notice, CTC attendees often still forgot to factor in time zone differences.

- Encourage attendees to be diligent with email in case you need to reach them. It's easy to find someone at an in-person event if you need to, but it can be more difficult when the event is online.

☐ Create an inviting atmosphere for attendees

- If you're hosting the event, be sure to prepare a title welcome slide and share that early so it's the first thing attendees see when they log on.
- Playing quiet background music before the start time can also set the tone and make sure attendees know that you're there.

☐ Preparing instructors for online events

- Ask each instructor to consider sending materials to attendees in advance. Attendees feel better-prepared if they receive materials several days before class.
- To get ready for the event, instructors should:

  - Provide early access to required online tools and platforms, rather than waiting until the weekend prior to the start date.
  - Insist that attendees follow all of the directions they provide, such as downloading – and testing – software and libraries or registering for academy accounts.
  - Make sure that whatever directions instructors provide are clear enough that they can be followed without assistance.
  - Consider providing attendees with a compressed zip file with all of the needed documents, rather than having to download them piece by piece.
  - Consider recruiting a TA (teaching assistant) to help with the online management of the class, if possible. It often works better with a two-person team: one to deliver the content, one to run the chatbox Q&A and keep an eye on background noise (i.e., muting people as needed).
  - Spend the first few minutes of the event going around the virtual room so everyone can introduce themselves to each other.

☐ Managing online logistics

- If you're arranging the web platform (Zoom, WebEx, etc.), be sure to make the instructor the host so he/she has all of the privileges needed to run the class.
- If you want attendees to engage online, it may help to prime the pump and post questions of your own in the web platform chat box.
- If your web platform includes a "waiting room" feature, make sure someone is diligently monitoring the platform to grant access to latecomers, or simply do not use this feature for the class.
- To encourage the sort of networking that happens at face-to-face events, consider creating an online forum using a platform like Slack.

☐ Avoid lunch programs
- Online attendees seem to prefer using their hour lunch break for real-world tasks; when the CTC has programmed online lunch presentations, the turnout was small. Lunches for online offerings do not have to be working lunches because the grant does not pay for them.

- If you do choose to offer an online lunch talk, you'll likely be using a log-in link different from the overall event training classes. Be sure to send the lunch directions later in the morning (after the morning sessions have already started) so attendees don't click on the lunch link expecting to get into their morning event class.

☐ Decide if you'd like to record the content

- If you wish to record, get approval from the instructor.
- Attendees often ask about recording the online sessions.
- Hours and hours of recording can fill up computer storage quickly, so you may not wish allow recording.
- If you do record the content, make it available to attendees for a set amount of time. Send a Dropbox link, for example, and tell them they have a week to get what they need after which time it will all be deleted.
- You could also put the onus for recording on the attendee as there are free apps available that record video and audio locally from a desktop screen.
- Likewise, what will you do if someone who didn't attend the track asked for a recording? The CTC declined those requests.

☐ Manage the back end for your presenter if you're the host and there is no TA

- Keep an eye on the attendees and mute anyone who's creating distracting background noise.
- It can help with attendance records to ask everyone to put their name in the chat box; you also have handy a hard copy of your RSVP list.
- Don't forget to enable the screen-share function so your presenter can show his or her screen.
- Have a script ready to read to welcome everyone and introduce the presenter.
- Most video platforms have a way to "spotlight" the presenter, so everyone only sees him/her. It's a good idea to use this feature.
- If you record the session, you can convert it into an MP4 clip and post it to YouTube for further sharing and dissemination. Additionally, many video platforms also provide real-time captioning.

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