

HOW TO PRODUCE AN EVENT | VIRTUAL AND IN-PERSON

These steps will guide you in producing an event. Many of these steps will be done simultaneously. We recommend you familiarize yourself with the complete document before you begin. Please see the Timeline Grid to understand the deadlines for each step.

1. **Idea Generation**

Inspiration can come from anywhere and your first step is to focus an idea into an event.

Please note: if you are partnering with an outside organization, please refer to the Affiliations Policy on the Family of Women web site. The partnership needs to be approved by the Board of Directors before you can publish or produce your event.

2. **Topic Outline** (Agenda Pre-Approval)

All agendas for virtual and in-person events that are advertised on the FOW website and social media channels must be approved by the Content Team. Begin the agenda approval process by submitting an outline or draft agenda for Pre-Approval from the content team. The Final Agenda is due by Week 4 at the latest. Description is listed in Step 11 below.

3. **Consider and Decide Event Date**

Choose a date far enough in advance to give your team the time to prepare. Consider the calendar, holidays, other FOW events, travel considerations, etc.

4. **Launch Call** (Opportunity to discuss the process and get your questions answered.)

The Launch Call is required before your event will be posted on our web site and social media channels. Chapter Leader schedules the Launch Call with the Events Team and the Controller. We strongly suggest the Event Manager, PTM and/or Zoom Host are in place before this call.

5. **Finalize Team Members**

Suggested positions include an Event Manager to be responsible for the overall event; Production Team Manager (PTM); Zoom Host for virtual events; Registration/Finance manager; Programming/Agenda Leader; Marketing/PR Managers; Facilitators/Leaders; Site Liaison for in-person events; Food Team Lead. Plus any other team leads necessary for your specific event idea.

6. **Location/Site Search** (Skip if Creating a Virtual Event)

Choose a proper facility in relation to the activity being produced. Some locations will offer specialized programming like a ropes course or other team building activities. Consider location and travel time and plan physical site visits.

- a. **Submit Requests for Proposal** (RFP) to multiple sites and include a proposed price point to start the negotiation.
 - i. Ask for non-profit rates.
 - ii. Ask for generous payment terms and cancellation policies.
 - iii. Check in with the controller if the FOW is sales-tax exempt in the state where you are hosting your event.
- b. **Check insurance requirements.** The FOW's general liability insurance has a limit of \$1 million. If the site requires a higher limit, ask to have the terms changed in your contract to match the \$1 million limit.
- c. If **catering** is involved, speak with the site to customize a menu at better rates than published by removing unnecessary components.

7. Create a Budget / Submit for approval

Use the “Event Budget and Actual Report Form” to estimate your expected revenue and expenses. Speak with the finance team if you have questions on how to complete this form. Expenses include the fees for processing registration payments through our website as well as items such as extra travel and meal costs for staff, supplies, printed materials, thank you gifts and door prizes. Draft form should be submitted before your launch call for discussion. Completed form is submitted to both the Events and Finance teams for review and sign-off.

8. Site Contract / Submit for approvals and signatures (Skip if Creating a Virtual Event)

Local chapter leaders cannot sign site contracts that involve legal liability. Submit to the Events and Finance teams for approvals before it can be passed on to the Board Chair to be signed.

9. Pause before proceeding

- a. Did you have your Launch Call?
- b. Is your budget approved?
- c. Is your site contract approved and signed?
 - i. Site requires insurance
 - ii. Site requires an advance deposit
- d. Did you receive your Pre-Approval from the Content Team? Are you on track to deliver the final agenda by Week 4?

10. Use our Website / Publish your Event (Registration Form)

Post your event on the FOW web site. From the Member Portal, click on “Submit an Article/Event” on the menu tabs. Follow the prompts and make sure you select “Tickets for sale” before you click “Submit.” The Media Team will send you the standard questions for the registration form. Reply timely to get your event published. Speak with the Media Team if you have questions. Consider selling merchandise - like a branded water bottle or T-shirt - concurrent with your event. You can pre-sell these items using the web site.

11. Final Agenda Approval (Content Team)

The Final Agenda must include all attachments, all videos, all links and any PowerPoint or other digital media. After your event, submit the Agenda as presented back to Content for archiving and future distribution.

12. Promote the event

Create a social media plan and enrollment plan to promote your event in the community and in the other chapters. Design your digital flyer paying attention to:

- a. Spellcheck and Grammar check
- b. Make sure you have the correct commercial permissions for illustrations and photographs (See “Guidelines for Use of Material and Images on FOW Website” in the Procedures folder in the Member Portal.)
- c. Make sure links are active and working properly
- d. Don't put Zoom room and password or other personal information on the flyer
- e. KISS (Keep it super simple)

13. Stage the event

PTM puts a production timeline in place, and recruits a production team. Contact the Events Team for production standards if necessary. Zoom Hosts learn the host tools and participate in practice sessions using the technology. Participant letters are sent out. Event manager coordinates payments to the site as per your site contract.

14. Financial Reporting (Actual)

Gather reimbursement requests from members who outlaid monies and submit for approvals and reimbursement. Initiate final financial reporting process by contacting FOW Controller. Frequently used forms like "Expense Reimbursement," "Expense Request" and "Transfer Request" are located in the Forms folder in Member Documents. Update the revenue and expenses in the "actual" column on the "Event Budget and Actual Report Form" which translates your proposed budget into a financial report. Submit to the Finance Team with proper back-up. Final financial statements are due one week post your event date.

15. Completion Calls and Wrap Up

Schedule completion calls with core team members. Create what worked and what didn't work documentation for your process. Acknowledge your volunteers! Celebrate your success! Send thank you letters and complete other follow up with women. Do you want to send a participant survey to help your chapter? Did you get your results and/or goals? Make sure the Agenda as presented has been sent back to Content for archiving and future distribution.

STANDARD TITLES FOR WRITING VIRTUAL AGENDAS

Zoom Host / Zoom Co-Hosts - Person(s) in the background who manages the Zoom Host controls in a production capacity.

Event Organizer - Chapter or organization that is organizing the event and preparing to produce it

Leader - Primary person facilitating the agenda

Auxiliary Leaders - Members who are secondary facilitators for portions of the agenda

Guest Speaker - Outside person facilitating an agenda or portions of an agenda

Breakout Room Leaders - Participants (typically members of the event organizing chapter) asked in advance to lead breakout rooms to facilitate the activity.

Participants - Audience members.

Scribe - Person typically a Zoom Host or Zoom Co-Host (production team) who captures discussion points using Zoom features. Suggestion - the Scribe can also take notes on what is working and not working with the technology

BEST PRACTICES FOR VIRTUAL EVENTS

- Dress is a matter of individual taste; how you dress yourself is a reflection of the virtual event and our professionalism. We are looking for a put-together and professional look with well-kept garments (no holes). Consider items like dress pants, skirts, dresses, blouses and sweaters. Skirts and dresses no shorter than three fingers above the knee. Also consider your comfort level, ease of movement and useful pockets. Examples of clothing items that are not permitted are hoodies, athletic wear, distressed denim, running shoes, loud colors and patterns that are a distraction and short skirts, to name a few.
- No gum chewing, eating, snacking, or other distracting activities while presenting. Water/fluids are allowed and encouraged to keep hydrated. Suggestions are a glass or bottle with a lid to prevent unintentional spills.

- Environment the presenter is in: Neutral, not-distracting background, correct lighting, no well-known artwork that may cause rights issues. Limit noise in the room (no squeaky chairs!). No visual or audio distractions. Presenters should have their video on at all times they are speaking.
- Be mindful of paper shuffling, noises in the background, excessive movements when presenting. Feel natural and not robotic.
- Screen share of FOW/ Event logo as the holding picture before the event starts.
- Presenter needs to be aware of where the camera is and make sure she is always facing the camera. Also make sure the camera is at eye level.
- Presenter needs to know where the microphone is for her device and speak towards it to ensure her voice is heard.
- Being prepared beyond what you are presenting for questions that may be asked.
- Have an engaging personality while presenting.
- Double check with the Zoom administrator the features you want to use in your event are selected before creating the Zoom link.
- Dry run of the event using Zoom link for the event with all devices set up to make sure all features work as required for a successful event.
- Screen shares need to be set up to avoid unintentional sharing of information through things like tab names in a browser and other items visible on the presenters screen. Use Advanced tab in the Screen Share menu to select the 'Portion of the Screen' before sharing.
- Make sure the information is correct and identify which device when giving instructions on using features of the platform.
- When using breakout rooms, ask the participants to open their chat and post the questions/discussion in the chat.
- Identify in the agenda when participants video and sound should be off.
- Start with positive and uplifting content

STANDARDS FOR LEADERS

- Be on time
- Respect confidentiality
- Tell the truth (and be open to hearing the truth)
- Participate fully
- Have a respectful and constructive attitude
- Be supportable
- Represent the Family of Women in everything you do
- Be open to new technology

OPTIMAL SKILLSET FOR LEADERS

- Articulate
- Unflappable
- Speaks clearly
- Organized
- Ability to adapt/respond to different types of characters
- Resourceful
- Active listening
- Grace under pressure
- Manage the timeline of the agenda

| TIMELINE WEEK | PRE | 12 | 11 | 10 | 9 | 8 | 7 | 6 | 5 | 4 | 3 | 2 | 1 | 0 | POST |
|---------------------------------------|-----|----|----|----|---|-------|---|---|---|---|---|---|---|---|------|
| 1 IDEA GENERATION | X | X | X | X | X | | | | | | | | | | |
| 2 TOPIC OUTLINE (AGENDA PRE-APPROVAL) | X | X | X | X | X | X | | | | | | | | | |
| 3 CONSIDER & DECIDE EVENT DATE | X | X | X | X | X | X | X | X | | | | | | | |
| 4 LAUNCH CALL | X | X | X | X | X | X | | | | | | | | | |
| 5 FINALIZE TEAM MEMBERS | X | X | X | X | X | X | X | X | | | | | | | |
| 6 LOCATION SITE SEARCH | X | | | | | | | | | | | | | | |
| 7 CREATE A BUDGET | X | X | X | X | X | Draft | X | | | | | | | | |
| 8 SITE CONTRACT | X | | | | | | | | | | | | | | |
| 9 PAUSE BEFORE PROCEEDING | | | | | | X | X | X | X | | | | | | |
| 10 USE OUR WEBSITE PUBLISH YOUR EVENT | | X | X | X | X | X | X | X | X | X | X | | | | |
| 11 FINAL AGENDA APPROVAL PROCESS | X | X | X | X | X | X | X | X | X | X | X | | | | |
| 12 PROMOTE THE EVENT | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X |
| 13 STAGE THE EVENT | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X |
| 14 FINANCIAL REPORTING | | | | | | | | | | | | | | | X |
| 15 COMPLETION CALLS AND WRAP-UP | | | | | | | | | | | | | | | X |

KEY **X** Deadline for In-Person Event

X Deadline for Virtual Event