# Virtual Events Logistics Planning Consultation

This can be used to walk through an initial consultation meeting with someone requesting support for a virtual event. Text in ***green italics*** are example questions to ask.

***Proper planning and attention to the logistics details can help ensure that your virtual event will be a success! I’ll ask you a number of questions to get a better of idea of the logistics and pieces for this event.***

Potential Items to Discuss *(note: text in green italics are example questions to ask):*

* ***Level of support*** ***requested***: ***Do you want to learn how to host your own events, or are you looking to have someone do the technology set-up and hosting for you?***
	+ **If they want to learn how to host their own events:** provide them some resources and set up a time to demo Adobe Connect to show and explain the different features, etc..

If they do not currently have an Adobe Connect host account, direct them to request one at this[FSTeams Collaboration Site](https://ems-team.usda.gov/sites/fs) (managed by Jon Holden, CIO).

* + **If they want you do the hosting:** walk through the rest of this document!
* ***Purpose & Goals: Please describe the purpose for the event and what your goals are. That is, what do you want to accomplish?*** Note: this will help you determine if they are looking for an info-sharing webinar or are looking to meet with people to gather information, make decisions, etc. This will also help them clarify what they are looking for out of the virtual event (for it to be successful for them).
* ***Agenda: Do you have a draft agenda you can share with me? Eventually, it will be a good idea for us to create a logistics agenda with virtual event details.***
* ***Date:*** Note info provided about timeframe and dates in the service request. Confirm whether a firm date and time has already been chosen (and if so, whether Adobe Connect is currently available) or if there is flexibility, in order to ensure that Adobe Connect will be available.
* ***Reoccurrence: Do you plan to have multiple sessions (identical or part of a series) or for this to be a regularly occurring event?*** E.g., monthly webinar or quarterly meeting.

Participants, Roles, and Locations:

* ***Who are the key people that will be involved in planning, facilitating/moderating, and presenting?*** E.g., meeting organizer, presenters, folks that will respond to questions from participants, IT support.
* ***How many presenters there will be and where will they be presenting from?***
* ***Will there be groups participants gathered in certain locations and/or will all participants connect from their individual work stations?***
* ***Are conference rooms reserved for any groups of participants? (if needed)***
* ***Accessibility: To ensure we provide an event that is accessible to all, do you know if any of the participants have specific access needs (e.g., for a working meeting they might know that a participant is hearing impaired or visually impaired).***

***Will this event, or a recording of it, be widely available for anyone to participate in?***

**If “yes”**, then note that in order to ensure the event/recording is accessible (and [section 508](http://www.section508.gov/section508-laws)-compliant) live captions should be reserved, information about keyboard commands should be provided to participants, and ppts need to be created and checked for accessibility (you can point them to the [guide for creating accessible ppts](http://fsweb.wo.fs.fed.us/accessibility/education/)).

* **Recording: *Would you like this event to be recorded?*** Note that it is possible to record audio from a phone line with the visuals in Adobe Connect.

Event Audio Options/Preferences: ***There are different options and settings we can choose from for the event audio: e.g. use a phone line for the audio, use voice over internet through Adobe Connect, or a blend of these two.*** E.g., if it is a meeting with a small number of participants and they all have good mics/headsets/webcams and high-speed and reliable internet connections, then they may be able to use audio through the computer if they want. For a webinar, they may have speakers use a phone line and give participants the option to listen either through the computer or to dial into the phone line.

**In most cases it is good idea to have a phone line available and configured (as a back-up).**

* ***Do all participants need to be able to speak up with questions or input, or can they just listen and ask questions through the web meeting (chat, poll, or Q&A pod)?***
* ***Would you like to use phone audio for the event?***
	+ **If “yes”** AND if there will be fewer than 250 participants, as: ***Do you have access to an AT&T Reservationless call line that can be used for this event? (one with the number 888-844-9904)*** Note: if they want to record the session or allow participants to listen through the computer, you will need the phone access code to configure an audio profile in Adobe Connect.
	+ **If “yes”** AND there might be more than 250 participants, explain that an AT&T Exec. Services or AT&T Connect Event Services phone line will need to be reserved.
	+ **If “no”**, confirm that ALL who need to speak up have hard-wired, high speed internet and good quality mics, headsets, or webcams. Recommend that this be tested during a dry run or walk through and recommend a phone line be configured to use as a back-up if needed.

Event Content & Features to Engage Participants

***It can help participants stay focused and engaged if you switch the format of the event often and provide opportunities for them to engage, ask questions, or provide input.***

***If known at this time, would you like to*** (note: if they are not sure, you might want to just list these different features that are possible):

* ***Have a ppt(s) loaded into the virtual event room for the presentation?*** PowerPoints need to be created and checked for accessibility (see the [guide for creating accessible ppts](http://fsweb.wo.fs.fed.us/accessibility/education/)). Note: In Adobe Connect, participants are able to click on active url links in a ppt to open up the site in a separate browser. To ensure ppts display properly, ask them to provide you the files to load into Adobe Connect prior to the dry run. All ppts for the live session should be provided a couple of days before (or even farther in advance if there are many files/multiple presenters).
* ***Show a pdf or other document on screen or do a desktop demo of an application or website (or do a screen-share of a document to type into as participants discuss)?***
* ***Have presenters or all participants*** (for virtual meetings) ***on screen live via a webcam so participants can see them?*** If yes, ask if they have a webcam or will need you to provide one and if there are remote presenters/participants they want on camera, ask them to check whether your presenters/participants have webcams (either built into a laptop or usb webcam).
* ***Show an image file(s) or photo of presenters (if not using webcams)?*** As a backup, or instead of using webcams, you can load photos of presenters into Adobe Connect to show while they speak.
* ***Allow participants to share ideas and ask questions through an open “chat” pod (everyone can see) or through a more closed/confidential Q&A pod? Will there be times for moderated Q&A?***

**If yes:** ***Do you want to participants to be able to speak up verbally with questions as well as type questions into a chat or Q&A pod?***

* ***Ask poll (or survey questions) to gather input from each participant or to do knowledge checks?*** Note that in Adobe Connect, they can have multiple choice, multiple answer, or open-ended questions. It would be best if they can provide the exact wording for the questions (and answer options) prior to the dry run or run-through session.
* ***Provide a handout(s) that participants can download from Adobe Connect to reference later?***
* ***Show a pre-recorded video, e.g., short video on You-Tube or for which you have the video file.*** Note: pre-recorded videos should be captioned if possible and in order for them to play on mobile devices, they need to be converted to flv files before loading into Adobe Connect. It takes time to prepare videos, so make sure there is enough planning and prep time.

***Additional options for web meetings specifically:***

* ***Use a whiteboard for participants to brainstorm ideas?*** Note: this works best for groups with roughly fewer than 20 participants (so there is enough room for everyone’s ideas on the screen).
* ***Have a “notes” pod or “virtual flip chart” for a meeting facilitator or note-taker to capture ideas that are shared, decisions made, and follow-up actions identified?***
* ***Break out the group (for a portion of the meeting) into smaller discussion groups?***

Next Planning Session: They will likely need to get back to you with some more information. Schedule a time for next planning call (or ask them to check your outlook calendar for your availability) and make sure they invite folks key for planning the event.

Potential date for dry run or technology run-through session: Explain that a dry-run or run-through with meeting leaders and presenters is important and should be scheduled about a week before the event (or farther in advance for more complicated events).

After the Consultation:Fill out as much information as you can in the logistics agenda template and review the details, pre-event checklists, etc.. that are provided in that template document.