Adding a Networking Component to Your Virtual Meeting Experience

Are you interested in adding a networking component to your SBER-AER17 Virtual Meeting viewing? If so, below are some tips and considerations that will help you plan a successful remote group viewing.

Please Note: You must first register for the Virtual Meeting at the appropriately sized group rate in order access the virtual meeting and share with a group.

Ten Steps to Success

1) Define the scope of your event
   - Do you plan to view the Virtual Meeting only within your own institution, or will you invite others?
     o To partner with another institution, reach out to those working in the HRPP/IRB offices at area institutions to see if there's interest in a group viewing.
     o If you plan to partner with other institutions or invite others from outside your institution, you are responsible for deciding how you'd like to divide the associated costs.
   - What is the structure of the remote viewing? Are you simply convening a group to view the Virtual Meeting together or do you want to build in group activities? For example:
     o Groups can watch sessions on their own and then reconvene to have follow-up discussions;
     o Groups can watch sessions together and then have a follow-up discussion or small group discussions;
     o Groups can host panels and breakout sessions in different rooms and attendees can sit with those interested in the same topic;
     o And more!
   - What will you provide at the group viewing? At a minimum, you’ll need meeting space, but you should also consider whether you want to provide food and beverage, handouts, conversation starters, icebreaker activities, etc.
   - How long should the event be? Do you intend to watch the full Virtual Meeting as a group (four days of content) or focus on one or two days of the meeting?
   - When should the event be held? Do you plan to view the Virtual Meeting live, view the recording (available for 30 days after the meeting), or view the proceedings (available up to a year after)?

2) Broadly outline the plan for the event
   Begin to structure the event, considering the SBER17 and AER17 Virtual Meeting Agenda for an idea of when sessions will be streaming live and when you can expect breaks in programming.
   - What will the event schedule look like (i.e., when should attendees arrive, when will the day end, what sessions will be shown and in what rooms (if applicable), etc.)?
   - Will your event require attendees to RSVP?
   - Will your event be held outside your institution (see number five below)?
   - Will you provide breaks and/or meals for attendees?
   - Will there be set times for networking opportunities (e.g., receptions, special meal functions that facilitate networking, team-building activities, etc.)?

3) Create an event budget (sample budget checklist provided below)
   - Determine funding sources available for your event.
   - If you partner with another institution, decide how you will split costs with that institution(s).
   Possible costs include:
     o Purchase of the Virtual Meeting at the appropriate sized group rate (required to access Virtual Meeting)
     o Food and beverage costs
     o AV costs
     o Event space costs
     o Staff time
4) **Develop an event planning checklist and timeline** *(sample planning checklist provided below)*
   - List all tasks that must be completed to successfully host your event.
   - Assign target dates for the completion of each task.
   - Assign a staff member or volunteer to take responsibility for each task.
   - Review your checklist periodically to ensure nothing is missing and that deadlines are being met.

5) **Locate a venue for your event**
   Depending on the needs of your event, possible venues include:
   - A meeting space at your institution or at another local company,
   - A local hotel that has meeting space, or
   - A local restaurant or banquet facility.

   Please note that offsite events tend to be more expensive than onsite events.

6) **Invite participants and/or promote your event**
   - If the event is open to other institutions, submit information about your event for posting on PRIM&R’s Events Calendar or send an open invitation to others in your area. If the event is invite only, invite specific individuals (e.g. internal staff, external partners, etc.).

7) **Pay attention to details**
   As the event date approaches:
   - Review your budget to determine if it is still realistic or if additional funding may be necessary.
   - Develop a system for tracking RSVPs.
   - Make plans for various aspects of the event such as catering, AV, meeting room set-up, etc., and communicate these needs with the venue. It is recommended that all onsite meeting logistics be finalized at least two weeks prior to the event.
   - Make sure you are providing adequate information for offsite attendees (e.g., timing, directions to your institution and/or to the meeting space, etc.).
   - Keep a running list of materials that will be needed onsite.
   - Review the Virtual Meeting FAQ and Technical Requirements to ensure your system is adequately able to stream the sessions.

8) **Hold your event**
   On the day of:
   - Arrive early.
   - If you’re inviting individuals from outside of the institution, consider having a check-in desk (ready at least 30 minutes before the event begins).
   - Review the meeting space to ensure everything is ready to go (e.g. room set-up, catering, AV, etc.).
   - Conduct sound and equipment checks. Review the Virtual Meeting FAQ and Technical Requirements to ensure your system is adequately able to stream the sessions.

9) **Post-event follow up**
   - If you’d like, you can send thank you notes to attendees, volunteers, and/or partners.
   - Finalize accounts receivable and/or accounts payable and prepare a final accounting of the event.
   - If you’d like your attendees to complete follow-up activities, inform them of your expectations.
Budgeting Checklist
While all of these items may not be necessary, this checklist includes items that may impact the budget for your event.

Marketting
☐ Design for print or online promotional materials
☐ Printing
☐ Postage for mailed announcements or invitations

Materials
☐ Forms/questionnaires
☐ Name badges
☐ Office supplies
☐ Shipping costs
☐ Any printed materials you plan to distribute during the event
☐ Any additional materials you plan to distribute

Program
☐ Temporary staff, if necessary
☐ AV costs
☐ Meeting room rental costs
☐ Signage for location
☐ Food and beverage costs
☐ Translators, if necessary

Planning Timeline
This timeline provides a checklist for your program. Adapt it to your own particular needs and establish your own set of due dates. Some of these items may not be necessary depending on the event you are organizing.

In Advance

Program and Planning
☐ Develop a plan, including an objective and budget for the meeting.
☐ Assign tasks to specific staff members.
☐ Determine whether you will require RSVP for the event (if you are requiring attendees to RSVP, create a way to track responses).
☐ Provide attendees with important on the information (e.g., location, time, expectations, and, if you're having attendees view portions of the Virtual Meeting on their own, provide them with the login information that you received, via email, with your group registration).
☐ Communicate with all event staff and volunteers about responsibilities, meeting times, and event schedule.
☐ Monitor budget on an ongoing basis.

Invitations/Marketing and Materials
☐ Create a plan for inviting your staff and/or sharing your event with research ethics professionals in your area.
☐ Notify PRIM&R if you would like us to include your event on our Event Calendar.
☐ Design and send outreach, either through email, hard-copy mail, or both.
☐ Print all onsite materials.

Venue and Vendors
☐ Book meeting site and support services (e.g. catering, AV, etc.).
☐ If needed, reserve meeting equipment (e.g., tables, chairs, dry erase boards, etc.).
☐ Finalize contracts with any vendors.
☐ Order food and beverage through the venue or a caterer.
1 Week Before

☐ Ensure all materials have been or will be transported to the event location.
☐ Print attendee list for check-in.
☐ Prepare packets and name badges if you're providing.
☐ Communicate with AV company and venue regarding any last-minute needs.
☐ Review the Virtual Meeting FAQ and Technical Requirements to ensure your system is adequately able to stream the sessions.
☐ Confirm final numbers for food and beverage needs.
☐ Communicate with staff and volunteers regarding on-site duties.

Day of Event

☐ Arrive well in advance of event's start time.
☐ Bring relevant materials/documents (e.g., phone numbers for onsite staff/vendors, schedule of events, etc.)
☐ Set up room(s), test AV. Review the Virtual Meeting FAQ and Technical Requirements to ensure your system is adequately able to stream the sessions.
☐ Check on food and beverage set-ups.
☐ Prepare to check-in attendees 30 minutes before the start of the event.

Post Event

☐ Finalize billing and prepare final budget.
☐ Send any planned follow-up outreach