

# Virtual programming

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HBA's policies and guidance around virtual programming and event opportunities for each of our event types: educational, networking and recruitment.

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## Virtual educational event setup

HBA components (i.e. chapters, regions, branches, affinity groups, programs) can plan and execute their own virtual educational offerings (i.e. webinars) Monday-Friday and there are multiple time slots available each day to choose from (maximum 3 webinars per day). To ensure webinar topics and dates/times are never in conflict with each other, while also providing our programming teams a lot more flexibility and ownership, we have developed a step-by-step process:

### Step 1: initial conceptualization

Begin developing your program concept and determining/securing potential speaker(s) internally (see [Event speaker management guidance](#) for more information). Leave yourself some flexibility, but begin determining a few potential dates and times that could work for all necessary parties for the webinar. Make sure to visit the [HBA Master Events List](#) to see what other events are in the works across HBA. This planning document also outlines holidays and HBA Central event dates to avoid. The Global Planning Calendar can also be used to collaborate across chapters or regions on similar event topics. We also have an [association-wide calendar](#) that shows educational virtual webinars already booked. Lastly, speak with your regional programming team to get a better idea of what other webinars are upcoming so you can better plan your event.

### Step 2: secure your webinar date and time slot

Visit [HBA's webinar scheduler](#) on Calendly to see which of the dates and times you've determined are available. This tool will show you in real-time what webinar slots are available on any given day.

- Times listed are in Eastern Standard Time, but you are welcome to convert to your time zone via the drop-down at the bottom of the calendar.
- If your webinar is longer than one hour or does not perfectly fit into one of the slots listed, please select the closest slot available. Please note if a time overlaps with an existing webinar, your time will not be approved.
- Once selected, enter your name, email, proposed webinar title, region/AG, description, speakers, and any additional comments (such as chapter name, if being handled by a chapter, exact timing if it differs from the slot you selected) and click **Schedule Event**.
- **Note: If you plan to hold your webinar on your region or affinity group's Zoom license, please also make sure the date and time are available on that platform and set up your webinar *while* booking your Calendly slot.**
- This is a best practice to ensure HBA events are not competing with one another. It also allows for HBA Central to market your event globally via our weekly event digest email, and reach a wider audience than just your chapter/region/affinity group -- which will in turn

increase your registration and revenue.

### Step 3: await HBA approval (within 2 business days)

HBA staff will review your submission to ensure the topic is not duplicative or competing with existing upcoming webinars, and confirm your date/time selection. Once approved, your event will appear on the **association-wide calendar**, which is available to all HBA programming teams for planning purposes and the individual who submitted the proposal will be directly notified.

### Step 4: set up your event for registration (needs to happen at least 4 weeks from your event date)

Once your webinar is approved by HBA Central, the concept is fully developed and speakers/sponsors are secured, you are welcome to open your event for registration following the procedure outlined in our **How to open an event for registration** article. Remember, the minimum pricing for educational webinars is \$10/€10 for members, \$20/€20 for nonmembers and this will be auto-populated in the pricing section for you. You are always welcome to increase these prices, especially if you are covering a popular topic or have important speakers.


Upon the submission of your event setup form:

- You will receive confirmation of your event submission.
- You will be notified when the registration link is available and live on the HBA website (after review and approval by HBA Staff).
- Your event will be automatically included in the weekly HBA event digest email and will be available for registration association-wide. *Note: events set up after COB Wednesday will not appear in the following Monday's digest.*

### Step 5: marketing and pre-webinar prep

**Marketing:** While your webinar is automatically added to the weekly event digest email, the chapter/region/affinity group is responsible for all other marketing of the event, such as on social media channels and through the HBA Community.

#### **Pre-webinar prep:**

- **Panel prep:** as you would with any other educational event, work with your team and speakers to ensure all are prepared to address the content and topics of the webinar, including preparing them with all questions that may be asked, and opinions they may be asked to give. Please feel free to have your team and speakers refer to **HBA Virtual Presentations - Speaker & Recording Tips (1).pdf** 
- **Develop your materials** such as:
  - **Slide deck:** please use HBA's Intro slides as a basis for your webinar presentation, which are templates with HBA branding, including an HBA informational slide and technical tips to quickly review with your attendees. **Download the HBA PowerPoint template**
  - **Other optional items:** poll questions, handouts to be shared with attendees, a few Q&A questions to be prepared should attendees not ask enough questions via the chat


## Step 6: technical rehearsal

Scheduling a tech rehearsal on the same platform you will be using is incredibly important to ensure all team members and speakers have an understanding of the technical nuances and flow of the event. It should be held a few days before the actual webinar date and last about 30-45 minutes. Be sure to include all event team members who will be responsible for something on the day of the event and all speakers.


**Before the rehearsal, identify your technical leader:** at least one of your team members should be savvy with the webinar platform so they can be the "Host". This person will assist and guide the team and speakers through any technical elements (such as video camera sharing, breakout rooms, polling, etc). It is helpful to inform your technical leader of elements such as polling, breakouts, etc that you are hoping to make use of before the technical rehearsal, so they can be prepared. Be sure to use the same technical leader for the live event.

**Please make use of HBA's [Zoom tech support tips](#).** These are a collection of technical tips and nuances that HBA's staff have learned over the years, which will help you run your event smoothly and look polished.

### During the tech rehearsal:

- Please make use of our [Webinar technical rehearsal guide](#) to walk you through the flow of the rehearsal and make sure you don't miss any important details.
- Use [HBA webinar tech rehearsal notes.pdf](#)  tool to log any and all important information.

## Step 7: hold your flawless webinar

Your team and speakers should log on to the platform 15-30 minutes early to ensure no one has any issues. Also, take this time to review any important last-minute items or gain clarity on any final details and feel free to refer to the [Zoom Interview Best Practices 3.pdf](#)  document to ensure everyone looks/sounds their best.

- Remember to use HBA's [Zoom tech tips](#) during the live webinar to ensure you don't miss any nuances.
- **Click "Record" and be sure to select "Record to Cloud".**
- Remind attendees to take the post-event feedback survey. This will be sent by HBA via email automatically. [Click here](#) for more information on accessing survey results.

## Step 8: post-event wrap-up

After your event, **send the shareable link to your event recording and any additional resources** to [events@hbanet.org](mailto:events@hbanet.org) so they can be emailed to all registrants. HBA will download the file for our archives upon receipt. More in-depth instructions can be found here: [How to send additional resources or event recordings](#)

Finally, thank your speakers and team for a job well done!

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## Educational Virtual Event Planning Timeline

Here is an at-a-glance timeline of the administrative HBA virtual event (webinar) setup process. The full process can be found [here](#).



### Relevant links:

- [Global planning calendar](#) - plans for every region, chapter, and component for the upcoming year
- [Virtual educational programming calendar](#) - virtual educational events already scheduled
- [HBA webinar scheduler](#) - tool to request and secure the date/time of your upcoming educational event (Calendly)
- [Zoom tech support tips](#) - tips for hosting events in a virtual setting

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## Virtual networking events

Chapters, regions, branches, and affinity groups are welcome to host virtual networking events for **HBA members-only**. We suggest offering chapter-specific events to help locals connect with other locals and avoid overly large groups that may be hard to manage. Please [click here](#) to see some networking event ideas that may also help inspire you.

**Virtual networking event pricing** : at the leader's discretion

- Virtual networking events should be open for registration [following the typical event setup procedures](#) on the HBA website. Virtual meeting login instructions (Zoom, WebEx, etc) should be included when submitting your event. These instructions will be sent via email to registrants automatically when they sign up.

### Virtual networking webinar platform options:

#### Option 1: use an existing platform you have access to

- Many leaders have existing access to virtual platforms such as Zoom, GoToMeeting, WebEx, Teams, etc through their work or their personal lives. If this is an option, please feel free to use existing platforms you have access to and are familiar with.
- Explore other free platform options such as FreeConferenceCall, Skype, Google Hangouts or Uber Conference.

## Option 2: use the Region's or Affinity Group's Zoom platform

- Zoom Pro features:
  - Capacity for 100 individuals
  - Breakout rooms
  - Offers active speaker view or gallery view (many simultaneous attendee webcam feeds)
  - Screen sharing and whiteboarding
  - Dial-in by phone or computer and chat feature
  - Find out more or get familiar with the platform at <https://zoom.us/resources>

**Important note:** *HBA is not able to provide technical support for events. A chapter, regional, branch, or affinity group leader must be able to run all technical aspects of the event in its entirety.*

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## Virtual recruitment events (formerly "engagement events")

Recruitment events are managed primarily at the local level by chapter engagement teams (and occasionally by regional membership experience teams) and available at no cost, open to members and non-members to learn more about the HBA, its value, and its benefits. More information about HBA event types and formats can be found [here](#). We recommend using the "About the HBA" PowerPoint template for this presentation.

Virtual recruitment events should be open for registration [following the typical event setup procedures](#) on the HBA website. Be sure to include the Zoom link for the meeting during event submission and registrants will be sent the link via confirmation email. Every region has its own regional Zoom account. Please contact your regional leadership team or Regional Education and Events President for the Zoom login information to set up the virtual platform.

**Important note:** *HBA is not able to provide technical support for virtual events. A chapter or regional leader must be able to run all technical aspects of the event in their entirety.*

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## Virtual event platform options

### Option 1: use an existing platform you have access to

- Many leaders have existing access to virtual platforms such as Zoom, GoToMeeting, Webex, etc through their work or their personal lives. If this is an option, please feel free to use existing platforms you have access to and are familiar with
- Explore other free platform options such as FreeConferenceCall, Skype, Google Hangouts or Uber Conference

## Option 2: use a regional Zoom platform

- Each HBA region has a Zoom license that their regional and chapter leaders are welcome to utilize for events. Please reach out to your regional Education and Events department to coordinate your date/time request.
- Zoom features:
  - Capacity for 300 individuals
  - Breakout rooms
  - Offers active speaker view or gallery view (many simultaneous attendee webcam feeds)
  - Screen sharing and whiteboarding
  - Dial-in by phone or computer and chat feature
  - Find out more or get familiar with the platform at <https://zoom.us/resources>

## Option 3: use a sponsor or company platform

Many HBA corporate partners and sponsor companies have graciously offered the use of their internal virtual meeting platforms for HBA events, specifically large-capacity educational events. If you're expecting over 300 attendees, it may be worthwhile to explore if your sponsor or a local supporting company may be willing to help you host your event.

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# Event speaker management guidance

For ease of event setup, HBA has developed the below two-step guidance to ensure the speaker administration pieces are taken care of in a timely manner.

## Step 1: immediately upon confirmation of the speaker's participation and *before* setting the event up for registration...

Request that the speaker create an HBA account or update their current HBA account (*please note, links below go direct to our front-facing HBA Help Center so can be shared directly with the speaker*)

1. **Create an HBA account** (if they don't already have one). They do not need to become a member and can just create a guest account. Once they create their account, please inform them that they will need to complete the tasks listed in step 2 below. OR
2. Update their HBA profile (if they already have one), specifically:
  - **Add or edit their profile picture** if needed
  - Ensure their **title** and **company information** is accurate
  - **Add a link to their speaker bio**
3. While in their profile, **complete the HBA Speaker Agreement**. If they have completed their speaker agreement, it will be reflected in the event's registration report once they have registered. *\*This only needs to be done once per calendar year.*

## Why is this?

During the **event setup process**, **HBA's system pulls your speaker's information directly from their existing HBA profile**. If they do not have an HBA profile, you will not be

able to add them to your event; or if their profile information is out of date/inaccurate, it will appear that way on your registration page.

**HBA staff are not allowed to edit speaker profile information** (such as their title, company) or add anything to their profile (such as a headshot or speaker bio) per HBA policy and GDPR regulations. We rely entirely on the individual to ensure their profile information accurate.

For these reasons and to ensure you are not held up during the planning process, it is very important that speakers all have accurate HBA profiles before you even begin the event setup process. If a speaker is not willing to do the above steps, please let them know that, unfortunately, they will not be able to participate in the event as a speaker.

## Step 2: once your event is open for registration...

HBA will notify you and send you all your promo codes. At that time, prompt **your speaker to register for the event using the HBA speaker code**. Here are instructions, should they need assistance registering:

- **Registering for an HBA event**
- **Registering *someone else* for an HBA event** (if they have an assistant, etc registering them)
- **Using a promo code**

Once these required administrative items are complete, you should be able to focus on ensuring the speakers are prepared for the live aspects of the event.

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## Five Ways to Create Better Engagement During Virtual Events

### From the AssociationsNow article titled "Five Ways to Create Better Engagement During Virtual Events"

As more associations convert **their in-person conferences into virtual ones** due to COVID-19, many are concerned about the ability to replicate the interaction, networking, engagement, and hallway conversations that are staples of face-to-face events.

On an ASAE webcast earlier this week called "**Tips and Tools for Creating and Awesome Virtual Event Experience**," the two presenters said it is definitely possible—you just need to be thoughtful and creative.

Here are five ideas that 360 Live Media Director of Experience Design Beth Surmont, CMP, CAE, and Matchbox Virtual Cofounder and CEO Arianna Rehak shared during the webinar:

**Prepare your speakers.** "It is extremely difficult to present to nobody," Surmont said. "A lot of speakers feed off their audience. So, the first time you present to no one, it is very strange experience and it can throw people off." That means associations need to talk to their presenters about what to expect—and also what they can do to deliver the best experience to attendees. If

they'll be on video, that includes having a clean background ("think newcasts," she said), wearing clothing that is not distracting, and having front lighting.

**Get your audience ready too.** "It's very important to bring a specific level of intention to your virtual event to help your audience understand how they can have the best experience," Surmont said. Tell them how to engage. "For example, submit your questions here. Raise your hand this way," she said.

Surmont suggested thinking of engagement through four dimensions: physical, physiological, intellectual, and emotional. For the physical dimension, for example, consider where people are participating from and offer tips on how they can create the best environment for themselves: "Keep your door closed, or put a sign on your door so you won't be disturbed," Surmont said.

**Build a virtual environment that's conducive to conversation.** "While pre-recording sessions often gets a bad rap," Rehak said, doing so allows speakers to engage actively in the conversation that is going on while attendees are watching their session. "The speakers love this by the way," she said. "They are seeing their content come to life."

If you do go this route, Rehak recommends having chat animators who "create a positive conversational environment that signals to other that they can join," she said. "That can be as simple as being the first to say, 'Hey, really excited to be here and get started.' That will set the right tone."

**Host virtual roundtable discussions.** "If you want attendees to dive into a specific topic, you may want to consider video chat breakout rooms," Rehak said. "It's really a way for folks to meaningfully connect with one another."

To make this happen, have a designated facilitator in each room so the conversation stays focused and gets people talking. If your association is unable to provide multiple facilitators, Rehak suggest supplying each room with a list of guiding questions. "You want to give them a sense of purpose around their interaction together," she said.

**Offer a little bit of fun between sessions.** Create moments between sessions that capture people's attention. For example, you can provide additional content during breaks, such as meditation or a trivia game. Or if you have awards to present, consider playing short videos of the winners. "Really, the world is your oyster in terms of that you can offer attendees during these breaks," Rehak said.

What ideas have you implemented for introducing engagement and conversation during your virtual events? [Please share with us.](#)

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## HBA-branded Virtual Background

HBA leaders are welcome to use our official branded virtual background (if desired) on HBA webinars and other HBA-related meetings to better represent our organization, Below is an image preview of the background as well as the image files for you to download and use. These were designed for Zoom, but should also work on other platforms.



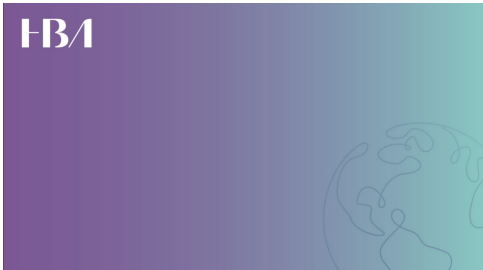
**Standard:**



hba zoom background.jpg

hba zoom background - mirror.jpg -

**HBA Globe:**



HBA globe background.jpg

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