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VIRTUAL MEETINGS

Most meetings have now transitioned from being in-person to meeting over a computer screen or other digital device. The following is a guide for your reference when planning a virtual meeting.

PLANNING YOUR MEETING

The basics of a meeting, whether in-person or virtually are: *Who? What? When? Where?* In a virtual setting, these are still important pieces of information to communicate ahead of time to those being invited even though there isn't a physical location where the meeting is taking place.



WHO

Establish who will be invited to this meeting?



WHAT

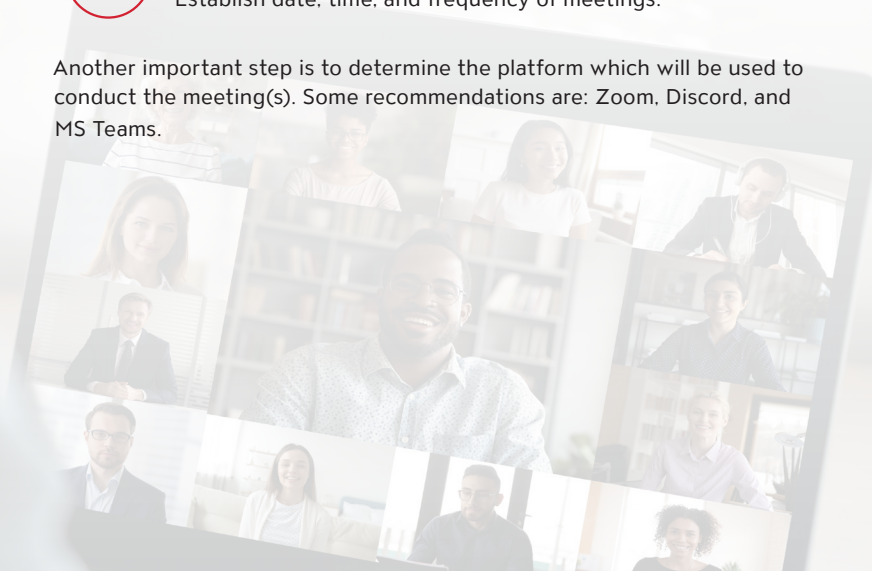
Determine what will be discussed during your meeting and create an agenda. In a virtual environment, engagement is essential; prepare ice breakers or team builders for your participants.



WHEN

Establish date, time, and frequency of meetings.

Another important step is to determine the platform which will be used to conduct the meeting(s). Some recommendations are: Zoom, Discord, and MS Teams.





BEFORE THE MEETING

Once you have established your meeting basics, send out your meeting invites. Invites should include:



DATE(S)

If your meeting will be recurring, it is recommended you use day of the week in the invites rather than dates to avoid confusion.



TIME

Establish the best time to meet based on everyone's schedules. If your meeting will be recurring, aim to keep the meeting at the same time for consistency purposes.



LINK TO THE MEETING

Depending on the platform you will be using, you may have the option to generate a link to send those being invited.



RULES AND EXPECTATIONS

If invitees are expected to have their cameras on or off, if they are expected to participate in an activity, if using the chat feature during the meeting is allowed, make sure to include that in your invitation. This will help everyone be more prepared for the meeting.

In addition to sending the invites, an agenda should also be sent out to all invited to the meeting.

The last step is to designate someone who will take minutes. If your meeting does not already have a designated secretary, establish who will take minutes.

DURING YOUR MEETING

On the day of your meeting, it is suggested that you login 10–15 minutes before your scheduled start time to test your Internet connection, your audio settings, and camera settings.

Once your meeting has started, reiterate the expectations and rules set for your meeting which were included in the invitation. For recurring meetings, unless the expectations change, there is no need to repeat each meeting. With the agenda distributed beforehand, attendees can reference the agenda or you can share your screen and display the agenda for all to see.

AFTER YOUR MEETING

Once your meeting is over, send out minutes to those who attended for their review. The recommended timeline is within 24 hours of the meeting so the information is fresh in everyone's minds.

Transitioning your meetings to virtual platforms can be overwhelming. We are here to provide resources to help you get started and are available to assist if you have any questions.

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VIRTUAL EVENT PLANNING

Virtual Events have become the new normal and we are here to assist you in that transition. We've created a checklist below for you to reference during the planning of your event.

BEFORE THE EVENT

Identify what type of event you are hosting and the purpose of your event. *Is your event a meeting where you will have discourse and have a high level of interaction with one another or will you be presenting information to a group with little to no interaction from them?* Focus on the purpose of your event and make sure everything moving forward leads back to that.

After you have identified your purpose, consider what activities will take place during your event. *Will you have multiple presenters, Q&A, live polls, or other interactive pieces?* If your event is longer than two hours, remember to schedule breaks throughout our program. When hosting an in-person event, participants are given "traveling time" between sessions. In a virtual environment, participants need that same time to take a quick break to stretch or step away from a computer screen for a few moments.



SPEAKERS AND PRESENTERS

If speakers or presenters will be a part of your program, the first step is to recruit presenters who can present content that is in line with the purpose of the event. Speakers should receive an invitation to present at the event that includes: date of the event, theme of the event, how the presentation will be presented, deadline to respond confirming that they can present. Once presenters have been confirmed, they should receive confirmation emails or notices with expectations for your presenters which includes: deadlines to submit any pre-recorded presentation material, date and time for tech rehearsal, agenda (tentative or confirmed), and arrival time the day of the event.

With your schedule established, identify the platform will you be using.



ADVERTISEMENT AND REGISTRATION

The next step is to begin planning how the event will be advertised. Factors to consider are:

- How will attendees register for the event? Will they respond to an email or register using a registration service?
- If registration fees are being charged, how will those be collected: through a service or other method?
- Sending Registration Confirmations — will this be automatic through a service or will someone from the planning team be tasked with sending them out?



REGISTRATION CONFIRMATIONS

Once an attendee registers and they are sent a confirmation, they should receive important information regarding the event. Share the link where the event will be available. Whether it's a Zoom link, YouTube page, or social media page, direct attendees to the appropriate location. In addition, share expectations in the confirmation. Are participants required to have their camera on? Should their mics remain muted through the event? If you plan to record your event, ask your attendees to sign a consent form stating that they agree to their voice and/or picture being recorded. Also emphasize that participants should not record or take pictures and then post elsewhere. These expectations will help participants be more prepared the day of and will help with the successful execution of your virtual event.

DAY OF THE EVENT

As the host, you should log in to your event link earlier than your attendees and presenters. This allows for time to test your connection, video, and sound. If there are any issues, you have time to potentially fix them. Your presenters should be slated to arrive at least half an hour before the event start time to give them time to test and then be able to troubleshoot if there are any technical difficulties.

DURING EVENT

At the beginning of your event, reiterate the expectations sent out in the confirmation notification. Promote interactivity during the event while using the chat features when appropriate. Provide opportunities for your attendees to network with each other whether that's built-in to your program or is an optional, separate session after your event.

AFTER THE EVENT

The event may be over, but the work is not. In order to gauge how truly successful your event was, participants should be sent a survey where they provide feedback on the event. The information collected will help determine if you met the goal or purpose of your event. It will also help determine how attendees felt about the event. Although the survey is an optional component, it will also help you decide how you will structure future virtual programs.

Each virtual event is unique and should be planned as such. We are here to provide resources to help you get started and are available to assist if you have any questions.

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