Professional Development Resources

A Guide for Chapter, District & Section Leadership

Produced by the 2019 Professional Development Committee, Rev. 09/2019

Reviewed and updated by the 2020 Professional Development Committee, Rev. 06/2020

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The Professional Development Committee

The PD Committee is one of 28 national committees designed to support the initiatives of the PRSA board of directors.

2019 Committee

Chair	Daniel Rhodes
Members	Jacque Coe, APR
	Melissa Dodd, APR
	Serena Ehrlich
	Christina Morton, APR
	Rita Tateel
National Board Liaison	Joseph Abreu, APR
Staff Liaison	Jason Barnhart

2020 Committee

Chair	Jo Ann LeSage Nelson, APR
Members	Jacque Coe, APR
	Serena Ehrlich
	Mindy Hughes, APR
	Christina Morton, APR
	Daniel Rhodes
	Rita Tateel
National Board Liaison	Rick Batyko, APR, Fellow PRSA
Staff Liaison	Jason Barnhart

About the Toolkit

The Professional Development Resources Toolkit provides chapter, district and section leaders with valuable resources available to them to enhance professional development to PRSA members and prospects. This document offers specific tools that can be given to a committee chair or Board of Directors member to perform most if not all of the functions of a dedicated Professional Development role.

This guide covers the value of professional development and how it can elevate our profession as well as PRSA's perceived membership value. Please take time to review its content and share the resources with your fellow board members.

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The Role of Programming, PD, and APR

To keep pace with rapid industry demands for new skills and knowledge, practitioners must be nimble and proactive at keeping abreast of changes and to quickly adjust when presented with new challenges and opportunities. As such, we share three key functions within the typical chapter board and briefly lay out how they complement and differ from each other.

1. Programming
2. Accreditation in Public Relations (APR)
3. Professional Development

> ***"Leadership and learning are indispensable to each other."***
> ***John F. Kennedy***

The most visible offering a chapter provides to its members throughout the year is its programming, which is often viewed as professional development. Programming consistently ranks among the most important offerings a chapter provides its members. It's the No. 1 way in which chapters bring together their members for educational and networking opportunities. Programming activities range from in-person meetings such as mixers to virtual events such as webinars. These events often make at least 50 percent of a chapter's operating budget in any given year and serve as the main source of revenue for the year. As such, all chapters have at least one board member (who is sometimes supported by a committee) dedicated to programming.

Another function within the chapter board makeup that is often viewed as professional development is accreditation. Through research conducted by National's PD committee in 2018, it was revealed 92 percent of respondents (accreditation chairs) are in a stand-alone position.

Accredited professionals are committed to lifelong learning. To maintain accreditation, they must seek additional learning opportunities through continuing education, giving back to the public relations community and other professional development programs. The role of the accreditation chair is vital to member value and career advancement, and while professional development has the same focus, accreditation is but one, albeit important, piece of the puzzle to advancing one's career.

From the same research conducted in 2018 referenced above, it's clear the professional development function is typically a component of the programming and/or accreditation role, if not a role and responsibility of several board members. In fact, 71 percent of professional development chairs are in their role as part of another position. Further, just 21 percent of these chairs are solely responsible for PD activities.

As a board member at the chapter level, the professional development (PD) mandate is driven by programming that accomplishes one goal: the advancement of your (the professional's) career. PD includes training on best practices in public relations, marketing, digital communications, online marketing and advertising. While this has overlap with the programming role, the PD role is not financially driven, and at the heart of the role is member value and career advancement.

In short, PD is the investment in one's career and member value for a chapter or district.

The Business Case for Professional Development (PD)

Why Chapters Should Consider Having a Dedicated Leadership Position for PD

More than ever, members of professional associations such as the Public Relations Society of America (PRSA) ask “what’s in it for me?” as it pertains to the value that they perceive from their membership. Traditionally, organizations look to deliver four values to members: a positive experience, increasing value over time, deliberate engagement, and relevance.

Professional development fulfills all of these values.

More than 80 percent of associations offer professional development and training programs, according to ASAE (The Center for Association Leadership), and about one-third administer accreditation or certification programs, too. On average, education and certification collectively are the third-largest source of revenue for associations after membership dues and events.

Associations are in a unique position to help close skills and information gaps among their members because of their organizational access to high-performing professionals, speakers, and trainers. Offering unique career development opportunities such as classes, workshops, webinars and certifications add great practical value to membership that encourages renewal.

Too often though, chapters are not able or do not commit the resources to a dedicated professional development program. Two common reasons are a shortage of member volunteers to perform the role or the belief that the chapter’s programming and/or accreditation efforts fulfill the PD requirement for their members. For many chapters though, the priority for programming is to raise money for operations. Again, events are the second-leading source of income for an association. While the APR accreditation is a PD function, chapters must provide less time-intensive learning options.

The case for professional development and adding a dedicated leadership role in your chapter involves looking at the function not as a moneymaker, but as a critical tool for demonstrating member value and growing member skill sets in a highly competitive job market.

Adding a leadership role may mean a new board-of-directors position or committee chair. Or, it can involve the addition of the function to another role, such as programming or APR. For any of these cases, the roles and responsibilities of a PD leadership position are included in this toolkit (see the Professional Development Chair Job Description section, page 7).

What outcomes may come from adding a PD leadership role at your chapter or district? The following list is just a sample of the offerings that could be made to your members:

- Educational content development
- E-Learning webinars
- Education and conferences
- Networking events
- Certification programs (besides APR)
- Career resources
- Mentoring programs
- Awards programs
- Scholarships and grants
- Chapter publications or learning guides
- Scholarly journals and conference paper databases
- Special interest groups

Working with the PD staff in PRSA's national office, and using the voluminous content and programs that it provides, a dedicated PD chapter role will offer clear member value and potentially generate income.

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What Members Want from Professional Development

Useful Intel from Surveying Chapter, Section, & District Leaders

In 2018, the National Professional Development Committee conducted a survey among chapter, section, and district leaders to ascertain useful intelligence that informs the types of PD offerings that chapters and districts should offer. Here are the findings from that research:

What topics are ranked most popular and requested by members:

1. Media Relations
2. Social Media
3. Crisis & Reputation
4. Communications Strategy
5. Issues & Trends
6. Measurement & ROI
7. Technical & Tactics
8. Leadership, Management & Personnel
9. Writing

What is the most successful delivery method for members?

Face to face still matters. More than 90 percent of respondents ranked conferences and workshops as the most successful delivery method in terms of member attendance and feedback. Webinars followed next with teleseminars and online classes ranked last.

How much are members willing to pay?

$50 or less is the sweet spot, with nearly 80 percent of respondents indicating that is what members want to pay.

Specific Topics

The following list includes specific topics that were of interest to survey respondents:

- Media panels
- Real-life crisis stories
- Creating and using podcasts and videos to engage audiences, video storytelling
- Integrated communications strategy and internal communications
- Strategies and tactics that can be implemented at work
- ROI for PR; metrics and measurement
- Diversity
- Gen Z
- Dealing with fake news and ethics in today's landscape
- How to create a social media strategy with limited time, budget and resources
- Storytelling
- Intersecting business plans with communications strategy
- Integrated Communications/PESO Strategy
- Influencer Strategy and Programs
- Web tools to better understand audiences

In addition, here are some quick links to additional association speaker's bureaus

- AMA speaker bureau: https://www.orate.me/speakers/AMA
- BIG Speak: https://www.bigspeak.com/marketing-speakers/
- Executive Speakers Bureau: https://www.executivespeakers.com/speakers-by-topic/Marketing
- Institute for Public Relations (coming soon!): https://instituteforpr.org/speakers/

What makes a speaker so special?

1. Topics are key
2. Stories and storytelling ability
3. Authenticity and stage presence
4. Engaging the audience
5. Generous with Q&A

Incorporating Diversity, Equity and Inclusion in Programming

PRSA's 2020-2022 D&I Strategic Plan provides guidance to position PRSA as a model for the communications profession, reflecting exemplary leadership in diversity and inclusion.

Professional development and other programs for PRSA members, guests, sponsors and partners should support progress toward PRSA's diversity and inclusion objectives.

PRSA encourages all districts, chapters and sections to actively seek out and include diverse speakers and panelists in programming, along with integrating diversity in topics and content. As appropriate, PRSA recommends that volunteers work with speakers to ensure they reference diversity, equity and inclusion in their presentations.

Succession Planning and Board Recruitment

"Live as if you were to die tomorrow. Learn as if you were to live forever."
Mahatma Gandhi

No profitable company plans in one-year cycles, and neither should you. Succession planning is critical to a chapter's long-term success, and it's important to incorporate professional development as part of that. As chapter leaders, you may already have a road map for future board and committee members for a minimum of three years out. As you identify potential leaders and approach them to fill a leadership position, consider the following talking points in your communications with them:

- Continued learning through professional development and experience is important for our own personal growth. We all play a role in advancing the profession – and PD is one such way we can contribute.
- Professional development is your career. The more you know, the more you can bring to the table. You become a stronger, more educated professional through PD. Board service can (and should) be part of that journey.
- Remember the best leaders are constant learners. What better way to hone leadership skills by helping others learn and advance their careers?
- For younger professionals, management skills are desirable but often unattainable early in one's career depending on the scope and size of their organization/client. As a result, many professionals use their board experience to fine tune those skills. Consider board involvement as a type of "sandbox" that enables you to further strengthen your team building and management, problem-solving, and creative visioning skills, ultimately growing your overall leadership abilities. Plus, serving on a board is a great example of how one can contribute to a bigger cause and work with a larger team/staff.
- Very simply, it's about paying it forward. Use your role as PD Chair to help build your career AND someone else's.

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Professional Development Chair Job Description

Each chapter's goals for the year will differ from a professional development perspective, but generally speaking, the following roles and responsibilities would apply.

Professional Development Chair Purpose

Professional development can be the spark for an individual's career in an age of change and disruption. The Professional Development Chair will support the chapter in offering communication professionals a wide variety of learning opportunities to help position them in a hyper-accelerated, highly competitive marketplace and seek to leverage PRSA National opportunities at the local level.

How do you get started?

- Talk with other leaders across the country in the same role. Ask to start a District-wide call specifically targeted to the PD chairs/board members.
- Consider conducting a member survey or add PD content to an existing membership survey.
- Start planning now. Let's say your chapter's goal is to plan one professional development workshop for the year. You should begin planning as early as possible to ensure the venue, date and speakers are all available. *See Planning and Conducting an Event*
- Review PRSA's Speaker's Bureau for programming ideas.
- Coordinate with the Programming Chair to ensure the PD event complements his/her efforts from a programming and sponsorship perspective.
- Check to ensure your event or activities do not conflict with or potentially cannibalize other chapter, district, or national events (e.g., young professionals, awards banquet, district conferences, ICON, etc.)
- Coordinate with the Accreditation Chair to leverage activities (i.e. workshops, boot camps)

During your term

- Identify PD offerings at the PRSA National level that could be leveraged for programming and/or disseminated via the communications committee. (i.e. the chapter pays for a PD webinar and hosts a brown bag lunch for members charging a nominal fee to attend)
- Meet regularly with the chapter president to determine PD needs for the year.
- While networking at events, ask others what interesting topics or learning opportunities they are seeing
- Coordinate at least one PD-focused event/workshop.
    - Consider hosting this or other events for different learning levels to support the various stages of the professional development journey (i.e. National offers PD programs at a Foundational, Intermediate and Advanced level)
    - Consider creating a localized guide for the Programming Chair to this effect
- Investigate various delivery methods for PD programming (i.e. in-person sessions versus online)
- Develop a communications calendar for PD offerings at the local and National level (i.e. conferences, certificate programs, APR boot camps, webinars). Share with the communications chair to disseminate on any local member news platforms and with the chapter president to include in remarks at events.

Speakers Bureau

The PRSA Speakers Bureau is an exclusive database of professionals within the communications industry — locally, regionally, and around the country. This members-only tool allows you to find the best-fit speaker for any event and provides members with resources for organizing conferences, workshops, and events. You can also sign up to become a speaker.

The Speakers Bureau is an extension of the PRSA mission, quickly connecting members to our growing database of speakers—who in turn will make your audience smarter, better prepared, and more connected through all stages of their career.

Learn More

Anvil Case Studies

PRSA's Silver Anvils honor the nation's leading public relations campaigns. The two-page summaries of Anvil and Award of Excellence recipients are entered into a database annually to provide members with guidance and advice on improving their practices and elevating our profession. The case studies search allows members to search by year, category, industry or outcome. The database goes back to 1968.

Learn More

Certificate Programs

As the preeminent learning organization for PR and communication professionals, PRSA offers a wide variety of learning throughout the year. PRSA offers certificate programs designed to provide specialized training and new skills to adapt for our ever-changing profession. To ensure our working professionals have time to participate, each program is available online and on-demand. The programs also offer one APR maintenance credit per module, with most offering up to six credits. Members and non-members can participate in these certificate programs.

- Reputation Risk Management
- Measurement and Analytics
- Content Marketing
- Communicating to Manage Performance
- Reputation Management
- Digital Communication
- Integrated Communication
- Crisis Communication

Learn More Download the Professional Development Catalog

Webinars

MyPRSA Learning gives members access to quality, live online and on-demand webinars as well as in-person trainings. Members can access the trainings by selecting the Learning tab of MyPRSA. Users can search by category, learning type, or keyword. Live and recorded webinars are free for members.

- Accreditation Preparation & Maintenance
- Branding
- Communication Strategy
- Conferences
- Crisis & Reputation
- Emerging Trends
- Ethics
- Executive Level
- Leadership & Management
- Measurement & ROI
- Media Relations
- Social Media
- Techniques & Tactics
- Writing

Learn More

Workshops

Prior to the COVID-19 pandemic, PRSA hosted in-person learning hosted annually in cities throughout the country. When it's safe for people to gather safely again, participants can learn how to increase personal effectiveness, become accredited, fine tune crisis communications, learn how to produce videos, or become media relations masters. The workshops run from one to three days. Costs for the courses vary but are open to members and non-members.

Learn More

Conferences

Post COVID-19, PRSA's frequent conferences will provide public relations and communication professionals with quality learning and connections to help them do their jobs more effectively. Conferences are hosted annually on a local and international level each year to help connect professionals to the latest information and services affecting our profession.

The International Conference (ICON) is the largest gathering of PR and communication professionals in the world. Several districts host conferences annually, giving local professionals a more affordable learning experience. Section conferences are hosted throughout the year to provide specialized industry-focused training. PRSA also partners with other professional organizations and highly regarded professionals to host conferences and workshops in-person and online.

Learn More

Professional Interest Sections

How to Join a Professional Interest Section

To advance your professional interests, PRSA encourages membership in one or more Professional Interest Sections, communities focused on your area of expertise. Specialized content and networking opportunities provide membership benefits, such as an exclusive online community, newsletters, training and in-person annual events. PRSA's Professional Interest Sections include:

- Association/Nonprofit
- Corporate Communications
- Counselors Academy
- Counselors to Higher Education
- Educators Academy
- Employee Communications
- Entertainment and Sports
- Financial Communications
- Health Academy
- Independent Practitioners Alliance
- New Professionals
- Public Affairs and Government
- Technology
- Travel and Tourism

Learn More

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Sample Call/Request for Speakers

This section of the toolkit offers PD chairs a variety of tools to create and manage a professional development event, including a call for speakers, request for a speaker, tips for venue contract negotiation, and more.

Sample Announcement: Call for Speakers

PRSA [chapter/district] is seeking speaker proposals for our [2020] season. As the industry's leading association for public relations professionals in [market], we are always looking for great speakers to lead discussions related to innovative public relations and marketing programming and professional development.

If you would like to submit a proposal to speak at PRSA [chapter/district], email [name] at [email address]. Questions? Contact [name] at [email address].

Speakers with strategic and/or tactical expertise in any of the following areas are encouraged to submit proposals:

- Public relations best practices
- Innovation in PR
- Innovations in the PR toolkit
- Measurement, data analysis and metrics
- Behavioral communications
- Visual storytelling or data visualization
- Customer message mapping
- Maximizing earned media
- Career growth
- Reputation management
- Crisis management
- Content strategy and marketing
- Digital communications
- Integrated communications
- How online, search or mobile marketing serves the public relations function
- Incorporating paid media into a communications strategy
- Influencer marketing
- The convergence of PR, IR and/or marketing
- Getting a seat at the C-suite table
- And more!

Please note that all topic submissions should be education focused and should not promote a specific product or service. The deadline for submissions is [date].

We look forward to hearing from you.

Signature

Sample Letter: Request for a Speaker

Dear [Name]

On behalf of the PRSA [chapter] Board of Directors, I would like to invite you to speak as a featured panelist at our [topic] event, tentatively scheduled for [date].

PRSA is the largest association in the world for public relations professionals, with more than 21,000 members nationwide. Our mission is make communications professionals smarter, better prepared and more connected through all stages of their career. In [market], our membership consists of professionals in public relations, social media, marketing as well entrepreneurs, CMOs, and students.

PRSA [chapter] hosts monthly panel events as opportunities to educate, share, and network with the [market] community.

[event details]

We will solidify a date and venue in the next several weeks. In the meantime, please let me know if you are interested in and available to speak on our panel? Once you are a YES, we will move forward with other details to prep you.

Please don't hesitate to contact me if you have questions!

Signature

Planning and Conducting a Virtual Event

Online events are growing in popularity and became critical to many professions in the global COVID-19 pandemic. More than ever, online events are used to connect, engage, and inspire. Yet, their execution needs thoughtful planning and promotion to ensure success and avoid awkward experiences that become virtual water-cooler stories.

The following information will help chapters and districts develop online events quickly and successfully. Using the following guide, your attendees will have a positive experience and your chapter will shine.

Use this overview to plan, but research your methods using the tips and ideas contained in the guide. You won't be sorry; the following resources and insights will elevate your events to a new level. Good luck!

1. Choosing the right platform

Use these questions to help guide decisions around features and security levels needed, supporting software and technical support to determine the best platform. Refer to the "Choosing an Online Meeting Platform" for more.

- ✓ Who and how large is your audience? This can determine your platform needs and security levels.
- ✓ How will they engage? Ensuring your platform syncs with expectations is key to managing the event.
- ✓ Do you need to record? Knowing this answer may help grow your audience or monetize the event later.
- ✓ Will the event be free, or will you charge a fee? Does the platform have software to integrate for payments easily?
- ✓ What's your budget? This can drive your decisions depending upon your needs.

2. Promoting your event successfully

Having a vision of how you want your event to be perceived, how you will spread the word, which tools you hope to use, and the experience your audience will have prior to the event will aid in promotion and planning.

- ✓ Will you have sponsors? Potential partners should be engaged early in the planning.
- ✓ How will you give your event an exciting feel? This helps brand the event and attract audiences.
- ✓ What tools will you use to promote the event? Images, landing pages, speaker profiles, etc. are assets you may need.
- ✓ Who will you utilize to promote the event and how will you do it? Leveraging your partners helps extend your reach.

- ✓ How will you know what your audience wants to know? Consider an advance AMA (Ask Me Anything).
- ✓ How will attendees register and how will the event get on their calendars? An easy experience is a first success.

3. Monetizing the event

Understanding the best way to charge for events and setting prices can be key.

- ✓ Setting a tiered rate system for students, members, and non-members.
- ✓ Attracting, engaging, and keeping sponsors to underwrite your expenses.
- ✓ Creating opportunities for revenue before, during, and after the event.

4. Managing the event and follow up

- ✓ Choose a good day, time, and multi-faceted topic for your audience. Ask, *"Why is my audience interested in this?"*
- ✓ Have a team in place to manage elements from financing to promotions, both during the event and afterwards.
- ✓ Set measurable goals; how will you know when you've been successful, both during the event and after?
- ✓ What format will best fit your audience? Presentation, panel, interview, TED-talk, game show or Q&A.
- ✓ Pick the right speaker or presenter and the best format for success for your topic and audience.
- ✓ Think about what attendees will see visually; make slides and visuals creative and interesting.
- ✓ Decide how you want your audience to engage and how early; consider sending out advance engagement tips.
- ✓ Have a game plan for the event and develop a run of show. Consider a dry run with your speakers.
- ✓ Plan B: what will you do if you have technology, presenter or audience troubles and how will you handle them?
- ✓ Consider ways to monitor the audience during the event and plan to pivot if they start to leave.
- ✓ Develop a follow-up plan such as a survey or call to action to keep them engaged.

These elements are covered in articles within the guide, but also consider contacting fellow PRSA chapters and districts for their best practices.

Best of luck!

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Virtual Event Resources

This section offers recommendations and tools to plan and carry out online events for your chapter or district. Important considerations are given to how to drive attendance to and monetize these events.

Advantages of Online Events

Now, more than ever, virtual programs will be critical to a chapter's or district's professional development offerings. As you move programming online, consider the following article to begin planning a successful event.

How Your Association Can Come Out Ahead by Hosting Virtual Events

This Events Industry Council video presents how to transition events online: https://www.youtube.com/watch?v=oNPqhzAXWaE

Choosing an Online Meeting Platform

There are a variety of platforms to consider for virtual programming (e.g., Zoom**,** Skype**,** Streamyard**,** LinkedIn, etc.). Here are several resources to help in choosing the best platform for your programming. Among the key elements to consider:

- Security and encryption
- Engagement options such as text and video chat, screen sharing and dial-in options
- Integration with other platforms such as event management software, calendar, etc.
- Recording and live broadcast features and
- Technical support.

13 Key Features to Look for in a Virtual Event Platform

https://www.aventri.com/blog/13-key-features-to-look-for-in-a-virtual-event-platform

15 Things to Look for When Choosing Online Meeting Software

https://www.business.com/articles/online-meeting-software-features/

How to Choose the Best Video Conferencing Provider 2020

https://www.uctoday.com/collaboration/video-conferencing/how-to-choose-the-best-video-conferencing-provider-2020/

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The Best Video Conferencing Software for 2020

https://www.pcmag.com/picks/the-best-video-conferencing-software

5 Best Web Conferencing Software Tools for Online Meetings in 2020

https://themeisle.com/blog/best-web-conferencing-software/

Livestreaming Options for Meetings

https://www.mpi.org/blog/article/livestreaming-options-for-meetings

Top 10 Live Streaming Solutions for Professional Broadcasters [Updated for 2020]

https://www.dacast.com/blog/top-10-video-live-streaming-solutions-for-pros/

Promoting Online Events

Chapters and districts can use a variety of tactics and channels to promote virtual events. While some of them may be similar to in-person event promotion, think about these unique factors of virtual events, including:

- Considering your target audiences and leveraging your stakeholders to promote
- Creating a landing page with images, date, event summary, speaker profiles, sponsor information, costs to attend, and FAQs
- Developing assets for social media to allow for easy promotion by others
- Enabling and encouraging registrants to share the event information easily
- Planning for simple registration as well as easy ways for registrants to add to their calendar
- Arranging for video previews of the event

Communicating with Prospective Attendees about Your New Virtual Event

https://www.membersuite.com/blog/communicating-with-prospective-attendees-about-your-new-virtual-event

10 Best Practices for Leveraging a Virtual Event

https://www.targetmarketingmag.com/article/10-ideas-leveraging-virtual-events/

Top Tips to Promote Your Virtual Event and Reach Relevant Audiences

https://www.vfairs.com/virtual-events-marketing-playbook-how-to-promote-your-online-event/

Monetizing Virtual Events

While chapters and districts have event registration platforms already in place, taking programming online presents new considerations for monetizing chapter events. It may appear that a free online event is easiest to perform, but consider the time, resources, and possible speaker and platform fees that the chapter or district may incur when planning a virtual event. Your attendees are paying for the content, and a nominal fee can help offset any costs associated with putting on the event.

Taking an event virtual gives you greater reach in your own community and beyond. A tiered rate system enables the chapter or district to charge student, non-member, and PRSA member rates, as well as rates specific to partner organizations and more. This rate scale will still provide a member benefit for the lowest possible cost to attend while gaining exposure with non-members. Some best practices include the following:

- Creative ways to monetize opportunities, from social, sponsors, speakers, and attendees
- Connecting virtual attendees with sponsors to maximize sponsorship return
- Ways to sell content—and various types of content—before and after the event

Tips for a financially successful virtual event:

16 Ways to Monetize Virtual Events

https://www.northstarmeetingsgroup.com/Planning-Tips-and-Trends/Event-Planning/Event-Technology/How-to-Monetize-Virtual-Events-Coronavirus

44 Tips for Maximizing Revenue from Virtual Events

https://www.pubexec.com/article/44-tips-for-maximizing-revenue-from-virtual-events-expos-webinars/all/

Creating Sponsorship Revenue for Virtual Events

https://www.eventbrite.com/blog/sponsorship-for-virtual-events-ds00/

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Managing Virtual Events

Online event platforms offer functionality that can help engage your attendees and provide a quality learning experience. Here are some tips to help ensure a successful virtual program.

Virtual Events in 2020: The Ultimate Guide

https://www.cvent.com/en/blog/events/virtual-events

How to Host a Successful Virtual Event: Tips and Best Practices

https://blog.hootsuite.com/virtual-events/

5 Tips for Chapters Doing Virtual Meetings

https://marinermanagement.com/resource/blog/2020-04-13/5-tips-for-chapters-doing-virtual-meetings-nofear/

Ban the Boring Virtual Meeting

https://www.billhighway.co/ban-the-boring-virtual-meeting/

30 Tips and Tricks for Hosting a Successful Online Event

https://www.eventbrite.com/blog/tips-and-tricks-to-hosting-a-successful-online-event/

Turning Virtual Event into Podcasts

Turning Your Video Chats into Podcasts

https://techcrunch.com/2020/04/28/spotify-owned-anchor-can-now-turn-your-video-chats-into-podcasts/

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Platform-Specific Guidance

When it comes to conducting virtual events, every platform has its own nuances. The playbooks below provide detailed, step-by-step information for chapters and districts to use in setting up their events with each respective platform. Some of the guidance may be applicable to other platforms.

LinkedIn: https://business.linkedin.com/marketing-solutions/cx/20/03/linkedin-virtual-events-activation-playbook?u=0

YouTube: https://www.thinkwithgoogle.com/marketing-resources/hosting-virtual-events/

Google Meet: https://blog.google/products/meet/bringing-google-meet-to-more-people

Instagram: https://later.com/blog/instagram-live/amp/

Virtual Event Checklist

Use this checklist to help ensure you have taken all factors into consideration in planning a virtual event:

Choosing the right platform

- ☐ **Who and how large is your audience?** This can determine platform needs and security levels.
- ☐ **How will they engage?** Ensuring the platform syncs with expectations is key to managing the event.
- ☐ **Do you need to record?** Knowing this may help grow your audience or monetize the event later.
- ☐ **Will the event be free, or will you charge a fee?** Does the platform have software to integrate for payments easily?
- ☐ **What's your budget?** This can drive your decisions depending on your needs.

Promoting your event successfully

- ☐ **Will you have sponsors?** Potential partners should be engaged early in the planning.
- ☐ **How will you give your event an exciting feel?** This helps brand the event and attract audiences.
- ☐ **What tools will you use to promote the event?** Images, landing pages, speaker profiles, etc. are assets you may need.
- ☐ **Who will you utilize to promote the event and how will you do it?** Leveraging your partners helps extend your reach.
- ☐ **How will you know what your audience wants to know?** Consider an advance AMA (Ask Me Anything).
- ☐ **How will attendees register and how will the event get on their calendars?** An easy experience is a first success.

Monetizing the event

- ☐ **Setting a tiered rate system for students, members, and non-members.**
- ☐ **Attracting, engaging, and keeping sponsors to underwrite your expenses.**
- ☐ **Creating opportunities for revenue before, during, and after the event.**

Managing the event and follow up

- ☐ **Choose a good day, time, and multi-faceted topic for your audience.** Ask, “Why is my audience interested in this?”
- ☐ **Have a team in place to manage elements from financing to promotions,** both during the event and afterwards.
- ☐ **Set measurable goals.** How will you know when you’ve been successful both during the event and after?
- ☐ **What format will best fit your audience?** Presentation, panel, interview, TED-talk, game show or Q&A.
- ☐ **Pick the right speaker or presenter and the best format for success** for your topic and audience.
- ☐ **Think about what attendees will see visually;** make slides and visuals creative and interesting.
- ☐ **Decide how you want your audience to engage and how early;** consider sending out advance engagement tips.
- ☐ **Have a game plan for the event and develop a run of show.** Consider a dry run with speakers.
- ☐ **Plan B: what will you do if you have technology, presenter or audience troubles** and how will you handle them?
- ☐ **Consider ways to monitor the audience during the event** and plan to pivot if they start to leave.
- ☐ **Develop a follow-up plan** such as a survey or call to action to keep them engaged.

Planning and Conducting an In-Person Event

Many online sites can provide helpful advice for how to plan and conduct an event. This 14-step guide comes courtesy of two sites, Capterra and Wild Apricot.

How to Plan an Event: A Step by Step Guide

1. **Develop a Vision for Your Event**

   Your vision is the foundation of your event. It's a breakdown of what you'd like to see go into and come out of your event, and can touch on speakers, revenue, attendees, and media attention.

   To get started, you have to know where you're going. Ask yourself three questions to help establish your vision:

   i. **What is your ultimate goal for this event?** This is the why that got you (or your client) moving in the first place. Are you hoping to raise money for a cause? Launch a product? Increase brand awareness? A combination of smaller goals? Determine what you hope to accomplish, and why this event is the way to do that.

   ii. **How many attendees do you hope to attract?** If the event is an annual affair, aim for year-over-year growth in attendee numbers. If it's the first time you're hosting an event of this kind, it's even more important to nail down a target attendee number so you can measure success (and create a budget; more on that later). Research attendee data for similar events hosted within the past few years to get an idea of what to expect.

   iii. **How much revenue are you hoping to collect from this event?** Like the attendee question, your aim should be year-over-year growth. Answering this question will help you establish your budget, and lay out what you need to make in order to recoup expenses.

   While they're often what springs to mind when you think of event planning (and one of the more fun aspects of the process), choosing themes, colors, and branding for your event come later.

2. Put Your Team Together

Any event takes a concerted team effort to handle all the details. Consider identifying one key Event Manager or Event Chair as well as individual Chairpersons for subcommittees, such as:

- venue management;
- speakers;
- entertainment;
- publicity;
- sponsors;
- and volunteer management.

Assigning individual roles to team members creates a system of accountability, as well as preventing tasks from falling to the wayside. Plus, it'll allow you to delegate.

After you put your team together, establish communication channels to foster successful collaboration and healthy dynamics. Chat software like Slack, team-based work management software such as Wrike, and the old reliable Google Hangouts are great communication options.

3. Establish Your Budget

Establishing your event's budget is one of the most important parts of planning an event. I've seen many great ideas fall by the wayside because the team who originally came up with it forgot to take their budget into consideration before beginning to plan.

Some of the critical expenses you need to include in your budget are:

- **Venue:** This cost should encompass the rental as well as any insurance you need to purchase.

- **Food and Drink:** This field is pretty self-explanatory. However, remember that the amount you can afford here might also dictate the number of tickets you're able to sell.

- **Entertainment:** This field can be customized however you need it to be — whether it's allocated for speakers, a DJ, or even a talking pig, make sure you have wiggle room for travel and accommodation costs as well as any compensation.

- **Décor:** Will you be going with a DIY mason-jar theme, or one that's a little fancier? Establishing the costs upfront will help you determine which one you can afford.

- **Staff:** This category might often be forgotten, but it's key to account for the transportation and lodging costs of your staff, especially if you're headed out of town. Even budgeting staff time (what would they be spending time on if they weren't working on this event?) can help you decide whether that extra meeting is worth it.
- **Marketing:** Whether you decide to promote your event through Facebook or go old-school by putting flyers up all over town,
- **A/V:** From projectors to wi-fi to speakers, this category encompasses a wide variety of costs.
- **Miscellaneous:** Even the best-planned event will have some additional costs come up. Accounting for them in your budget will ensure you're not caught unawares.

Even if some of these items aren't fixed costs yet – for example, if you haven't yet picked a venue – it's important to keep the maximum that you can afford to spend in mind before making those decisions.

4. Set the Date

The date might already be pre-set for a recurring event, but if this is a new event, be sure to consider the following before firming up your date:

- Give yourself enough time! Ideally, you should have 4-6 months to plan, if not more (depending on the nature of your event)
- Be aware of statutory and religious holidays
- Avoid school holiday time periods (winter, spring and summer holidays)
- Check dates with key participants – speakers, presenters, VIP guests, etc.
  Once you've set the date (and have already outlined your budget), you can start booking any external staff (such as caterers) you need right away.

5. Book the Venue

Once you have the date nailed down, it's key to book your venue as soon as possible. Your event has to have a date and location nailed down before you can begin advertising, so this task needs to be completed as early in the planning period as possible.

(Note that some flexibility around the date might also help you out at this stage and open up a wider variety of venues.)

Some things to consider when picking a venue for your event are:

- **Accessibility.** Does the venue have accessible entrances and elevators? Are there all-gender washrooms? Will you have space for interpreters? This and many other factors go into choosing a space that all participants will feel comfortable in.
- **Size.** An event for 50 people will need a very different space than one for 500. Additionally, consider whether or not you'll need separate rooms for breakout sessions or the like.
- **Parking.** Is there a parking lot, or is it easy to access via public transit?
- **Insurance.** Will you need to purchase separate insurance? What are their liability rules?
- **AV.** If your event needs speakers and microphones, make sure it's easy to set them up in the space that's available. The same goes for WIFI access (and cellphone connection!), or any other technological needs your event has.
- **Costs.** How much of a deposit is the venue asking for? Will there be additional costs? How much will you get back if you (heaven forbid) need to cancel?

6. Create an Event Master Plan

Once you have a good idea of all the costs and the timeline associated with your event, it's time to start the real plan! Creating your event master plan will allow you to ensure every aspect remains on track, as well as making it easier to coordinate with volunteers and event committee members.

Your event master plan should encompass all aspects of the event, including:

- Venue, logistics, & catering management (contracts, permits, insurance, etc.)
- Speakers and presenters (identifying, confirming, logistics & management)
- Activities and entertainment
- Publicity and promotion (online & off-line, such as web page & online promotion; events calendars; printed programs; media relations; signage; social media, etc.)
- Registration (online sign-up, payment and tracking; on-site sign-in, etc.)
- Sponsor and partner management
- Volunteer management and responsibilities

While planning your event, consider also creating a detailed timeline, so that everything moves smoothly. Include when any permits or insurance policies need to be submitted, when registration ends, and a detailed timeline of the day-of.

Although it might be tempting to say, “It’s all in my head! I’ll be fine!” and not be concerned about writing it all down, beware: this kind of mentality will make it much more difficult for you to assign accountability. It’ll also make it more difficult to remember what you did for the next event – so do your future self a favor and keep everything written down.

Finally, if you or your organization has run previous events of a similar type, reviewing any documentation that exists at this stage can help you ensure you’re not missing anything.

7. Identify and engage event partners and sponsors

To stretch your budget and increase your reach, corporate sponsors and community partners are the way to go.

In addition to helping you cut costs, buy-in from larger players can open advertising and attendee exposure avenues you may not have had access to before, add stability to a smaller operation, and increase your chance for success. With more benefactors in the mix, your event poses a much smaller financial risk to your company or event firm.

When you’re ready to seek sponsors and partners, follow these four tips:

i. **Understand their marketing objectives.** Are prospective sponsors/partners looking for an opportunity to improve their public image? Do they want exclusivity in advertising? It’s important to know the answers to these questions when seeking sponsors so you aren’t caught off guard when your partner/sponsor asks for advertising space or inclusion on an event initiative.

ii. **Identify the real decision makers.** It’s important to know who to talk to so you don’t end up repeating your pitch, or counting on a partnership that falls through because your contact lacked the authority to build that relationship. Some businesses defer such decisions to their marketing teams, while others may require you to climb the ladder to the executive level.

iii. **Make sure their business compliments your vision.** Seek partners with a business vision that matches your event vision to ensure a more enthusiastic relationship. This also allows you to push forward with your event without angering or repelling any attendees by presenting a conflicting message.

iv. **Know when to ask.** Most businesses plan out their major sponsorships before the start of their coming fiscal year. If you’re seeking corporate sponsorship, it’s important to make inquiries well ahead of time to ensure you’re on their radar when the time comes.

8. **Develop Your Event Branding**

If you want your event to stand out, you need to choose a timely and compelling theme that sets you apart from your competition. This means that you need to come up with a dynamic overall theme and you need to take great care with the actual name since it can be a key attention-getter, especially in online media.

- **Brainstorm names:** When you are brainstorming the event name, think about:
    - How is your event different from other events in your sector?
    - What are you hoping to convey through this event?
    - What are the main components of your event?
- **Create a tagline:** Once you've come up with a name, also try to craft a tagline – a short, memorable branding slogan that describes the event.
- **Design a logo:** The final step will be having a logo created to represent your event. A logo can be an effective branding tool – offering immediate recognition of your event in all your publicity and promo items (such as t-shirts, water bottles, bags, and more).

Once you have your name, tagline, and logo, use it in all your marketing collateral so that people who are unfamiliar with your organization will start recognizing your brand – and remember that the event is happening.

Most of this should be handled by your promotions coordinator(s), with team input.
If you're on a strict budget, creating branded materials (especially for online marketing) can have little-to-no impact on your spending if you use the right tools. Graphic design tools like Canva, Piktochart, Pixlr, and GIMP offer some (if not all) of their services for free. Some come with pre-made templates to make the process even easier.

When making graphics and other marketing materials, optimize for each marketing outlet. Social platforms don't follow a universal image size, and if you get it wrong your image can be cut off by dimension limits, or render poorly.

Keep this cheat sheet close at hand:
- Facebook: 1200px by 630px
- Twitter: 440px by 220px
- Instagram: 1080px by 1080px
- Pinterest: 222px by 150px

9. **Develop and Deploy Your Event Marketing Campaign**

Even with the most amazing speaker or entertainment line-up, you need publicity to get people in the door. Event promotion starts with the initial notice or page on your website, note in your newsletter or email to save the date, and then builds to include online and off-line publicity, media relations and on-going outreach to encourage registration.

Some components you might want to include in your plan are:

- Web page announcement
- Social media
- Email blasts
- Press and media connections
- Printed materials

10. Social Media

Let's break down your social media marketing options by platform and examine some suggestions on the best places/ways to post on each.

- Facebook best practices
  - Join and post in groups relevant to your event theme (whether it's political, environmental, business-oriented, technology-focused, or otherwise)
  - Use visuals to make your posts as appealing as possible (both static images and videos)
  - Post at least twice a day on your Facebook page to maximize engagement
  - Facebook's algorithm changes have virtually eliminated organic reach for business pages, so invest a portion of your marketing budget in boosting posts and creating ads for your event

- **Twitter best practices:**
  - Limit hashtags to two per post
  - Use keyword research tools like Keyhole and Hashtagify.me to ensure reach and popularity
  - Send out no more than three tweets per day
  - Use GIFs and images in your tweets to increase engagement

- **Instagram best practices:**
  - Post at least once per day on Instagram
  - Adopt a "the more the merrier" mindset on using hashtags on Instagram
  - Be sure to use different hashtags with each Instagram post

11. Content Marketing

Content marketing is a great way to attract attendees and talk up the benefits of attending your event. Your content should be useful and relevant to your event, whether it is how-to guides or resource lists.

An effective content marketing strategy requires commitment and optimization. While it's great for readers and attendees to discover your content through social media, relying on Facebook and Twitter is becoming less and less effective due to drastic algorithm changes. To combat this, you need to establish yourself (and your event) in search engine results (Google, Bing, and the like).

How can you do this? The magic of SEO.

Here are five key actions to optimize your content so it performs well in search engine results:

- **Produce content on a regular basis.** Whether you opt for blog posts or YouTube videos, it's important to establish a regular publishing schedule. Producing content regularly shows Google that you are a consistent and reliable source of information, leading to higher search engine rankings. Once, twice, three times a week? It's up to you, but be consistent and let your audience know when they can expect new content from you.
- **Keep your content on topic.** Google uses web crawlers to evaluate your content, juxtapose it to the promise of the headline, and make sure it delivers on that promise. If your content doesn't deliver, your low search rating will reflect that.
- **Conduct keyword research.** Using high search volume/low competition keywords is the key to a high ranking on Google's search results page, but your keywords need to be relevant to the promise of your content. If you need help finding keywords to target, use tools like Google's Keyword Planner Tool and KeywordTool.io.
- **Link internally.** Linking to relevant content on your website or channel helps decrease your bounce rate (the percentage of visitors that leaves your site after visiting only one page). The longer a visitor spends on your website, the more likely they are to convert (register for your event).
- **Seek out guest posting opportunities.** It's important to establish relationships with other outlets that are relevant to your event. Guest posting is a great way to do that, and it gives you the opportunity to increase event exposure and drive traffic to your event website. More exposure means a wider range of potential attendees. Wide exposure from other sources also tells Google that your content is useful and relevant (based on how often your links are referenced).

12. Final Preparation and Day-of Processes

Finally, no promotional plan is complete without the post-event thank-yous, sponsor acknowledgements and articles about the event's key messages or fundraising success.

Once you've prepared everything going on around the event, keeping track of the order of the event itself and planning out your program is the next step.

To ensure you're prepared for anything, prepare an agenda that will walk you through the whole day from setup to cleanup. Including every detail, no matter how small, will help you feel like you have it all under control!

Here's a quick example of what something like this might look like:

- 5:00: Drop off silent auction items at the venue (Diana)
- 6:15: AV setup (Terry, Diana)
- 7:00: Have quick volunteer coordination meeting (Terry + volunteers)
- 7:30: Attendees begin arriving
- 8:00: Hors d'oeuvres served
- 8:30: Speaker 1 takes the stage
- 8:45: Break
- 9:00: Speaker 2 takes the stage
- 10:00: Awards presented (Diana)
- 10:30: Mingling, silent auction bidding finishes
- 11:00: Start clearing tables
- 11:30: Bar closes
- 12:00 Event ends; all guests must leave

Identifying just who needs to do what can ensure that there's clear accountability leading up to the event. And as a bonus, you can also use a simplified version of this in any branding materials as your public-facing agenda.

13. What to do before the event:

i. Call participating vendors to double check on equipment, catering, and sponsors
ii. Check in with the venue owners/managers to confirm the date and time everything will be ready to begin setup
iii. Test all of your equipment as it arrives at the venue
iv. Set up your ticketing system for guest check-in
v. Create a final schedule handout
vi. Prepare swag bags with vendor materials
vii. Set up a volunteer management system to track shifts and responsibilities if you're bringing on extra help

Once the event starts, lock in your overseer role. Manage your guests, their needs, and your staff, but not on a granular level. Focus on the experience and facilitating a smooth operation. Trust in the prep work you've done, and the team you've assembled.

14. Post-Event Review (Bonus)

Congratulations: you survived your event!

How will you determine if your event is a success? Do you measure success by the number of registrants or attendees, or is it dependent on you breaking even or raising a target amount in donations?

By the same token, if the objective of your event is to raise awareness, you'll have to benchmark and gather data on online social media activity and mentions, as well as offline publicity – based again on your initial goals.

Once you've gotten back your attendee survey and talked to your staff, a few questions to ask yourself are:

- **How did we perform against forecast?** This can be your attendee number forecast, your budget, or any other prediction you made about the event. If you ended up on target, great! But if not, review what you could do better for next time.
- **What was attendee feedback like?** Some one-off comments can be written off, but if there are some points that come up several times whether positive or negative, they're worth taking into consideration.
- **How did our team perform?** You can use your event as a great feedback generator for everyone else who helped you with it – as well as earmarking volunteers for particular tasks in the future.
- **How did our marketing do?** Which activities provided the most ROI? Whether it was creating an event on Facebook or talking to the local press, determining which one performed best will help you decide which route to take next time.

PRSA

Venue Contract Negotiation

Content provided by Venable, LLP. PRSA is not responsible for chapter/section/district contract negotiations.

Key Recommendations

When you first start to seek a venue, consider these recommendations to maximize your negotiation position and ensure you are prepared.

- Consider your market and competition for hotel accommodations and meeting rooms.
- Aggregate smaller meetings
- Seek multi-year contracts
- Consider doing a request for proposals
- Come to negotiations with your own core contract provisions
- Everything negotiated should be clearly written in a signed contract. The contract needs to speak for itself. Make sure details are included and avoid ambiguity.

Pay Attention to Contact Terms

Room Rates

Seek to secure the lowest room rate available. Ensure it's the guaranteed lowest published rate and include internet sales and monitors. If there is a lower rate, get the venue to match it for the entire group or remove the advertisement. This can assist when considering penalties referenced below.

Clearly state that rooms are "…made available for reservation and payment by group meeting attendees." Clearly list room block size and room rate. Include dates/deadlines for room block adjustments and have the reduced room block flow down to attrition/cancellation penalties. This reduces liability if rooms are not booked. You may also arrange a room block release on a specific date.

Avoid cost creep and additional charges for service fees and gratuities. Include a clause that "no additional charges will be incurred for work performed and/or services provided without written consent from an authorized representative of group."

Damages/Penalties: Attrition/Cancellation and Mitigation

Consider negotiating for a "no attrition/penalties" provision. If not possible, damages or penalties may still be managed. If one side breaches a contract, then the other side is entitled to damages but not penalties. Types of damages are actual (amount of loss caused as a direct result of breach) and liquidated (amount agreed to by parties at the time of contract, before any breach, to approximate damages).

Five Steps to Prevent the "Double Dip"

Double dipping occurs when the hotel gets the liquidated damages, yet retains the ability to resell canceled rooms.

1. Mitigation Clause: Hotel shall undertake all reasonable efforts to resell canceled rooms, and will credit those revenues against the liquidated damages in an amount not to exceed the full amount of such damages.
2. Timing of Payment: Damages, if any, shall be due and payable X days after [original meeting date] provided the Hotel provides proof of its efforts to mitigate damages and proof that rooms being held for Group's attendees were unsold.
3. Exclude Fees/Commissions/Taxes: Fees, penalties, or liquidated damages, if any, shall exclude service charges, surcharges, and commissions, as well as state and local sales taxes, unless required by law.
4. Deduct Costs Saved: If Group is required to pay an attrition fee, the fee shall be calculated by multiplying X% of the Single Room Rate by the difference between the number of actually used rooms and the Room Block Target with credits from guaranteed no-shows, cancellations, and early departure charges, if applicable.
5. Average Occupancy Rate – Not Last Sell: Group shall not owe any fees, penalties, or liquidated damages if Hotel meets or exceeds its average occupancy level for that particular period of the year.
    a. Example: Hotel has 100 rooms, but only sells 50 on an average night.
        - Room Block: 40 Rooms – Cancelled
        - Rooms Sold: 45
        - Last Sell: 0 Credit (55 Rooms Remain Unsold)
        - Average Occupancy: Pay for 5 Rooms

Liability: Force Majeure, Indemnification and Insurance

1. Emergency or non-emergency beyond the party's control
2. Delineated Risks – such as terrorism, threat of terrorism, government travel advisories
3. Preventing or delaying at least 25% of Attendees and guests from appearing at the Event
4. Making it illegal, impossible, or commercially impractical to hold the event or perform the services
5. Contract may be terminated or performance excused by either party without penalty for any one or more of such reasons by written notice from one party to the other

PRSA

Warranty of Services Clause

"Hotel represents and warrants that the Hotel and Hotel's facilities, including services to be provided by Hotel to Group and its attendees pursuant to this Agreement, and the area surrounding the hotel at the dates herein set forth shall be of substantially the same condition and quality as currently exists as of the date of this Agreement."

Indemnification (Compensation for Harm or Loss)

GOOD

- Reciprocal - A reciprocal clause is desirable where each party indemnifies the other for (is responsible for) its own negligence (mutual indemnification).
- Limited to Control - What each party is being asked to be responsible for is within its control.
- Limit Scope to Insurance Coverage (employees? volunteers? third parties?)
- Includes Defense Costs

BAD

- "Sole," "Gross," or "As determined by a court"
  - This restriction would limit liability and make it harder for indemnification to kick in. Only one party would have be at fault, whereas removing "sole" distributes liability among the parties according to percentage of fault.
- Coverage of third party negligence
  - Meeting attendees (expect perhaps board members, etc.)

Top 10 Recommendations for Chapters to Bolster PD

1. *Designate a PD Chair* on board of directors. Identify a successor to your PD chair and *keep consistent records* to pass along information through succession.

2. Commit a *dedicated budget* to the PD effort that is separate from Programs or APR. This budget may come from sponsors, involve an investment from the chapter, or both.

3. Ensure that the PD, Programs, and APR chairs are clear on roles and responsibilities with regard to their respective offerings to chapter members (see the guidelines in this document).

4. Chaired by a PD Chair, create a committee, advisory council or other body to help *provide strategic counsel* and/or event planning and logistical support.

5. Ensure that programming *includes diverse speakers and panelists* and *integrates diversity in topics and content.*

6. *Leverage resources from PRSA National* for potential opportunities.

7. Perform regular communications to membership.

8. Either formally or informally *survey members* on the type of PD offerings they would like to see offered.

9. Plan a PD event or activity based on feedback (see resources throughout this document).

10. *Adopt a "member value over moneymaking" mindset* to carry out an event; sometimes, it may require an investment from the chapter for a speaker or other necessary asset.