VIRTUAL EVENT TASK LIST

An event timeline outlines roles and responsibilities, including tasks to be completed before and after the event. The following template will help you create a timeline for a virtual event. If you are planning an in-person or hybrid event, please refer to the event task list for in-person events.

PRE-EVENT

3 months to 8 weeks ahead

☐ Contact Gloria Chu, Director, Ceremonies and Events for an event consultation (if applicable)
☐ Draft an event brief outlining the goals and objects of the event
☐ Schedule an event strategy meeting with event leads to review event brief and begin planning process
☐ Determine the platform and format for your virtual event
☐ Select date and time for your event. Confirm dates with key speakers or staff
☐ Complete MECS request if Zoom Webinar license or additional staffing is required
☐ Complete IT Services request for event recording, if applicable
☐ Create event budget
☐ Plan your program with virtual event platform and staffing limitations in mind – e.g. simplicity, duration, number of speakers, engagement, etc.
☐ Begin compiling an invitation list

8 weeks to 4 weeks ahead

☐ Draft program schedule. Consider speaking order and timing
☐ Determine speakers, emcee and staff roles for day of event
  o Determine if speakers or presenters will present from home, campus or other space, and if they require additional technology (e.g. laptop, microphone, etc.) to be delivered to their home
  o Consider back-up plan when staffing
☐ Determine if participant engagement tools or activities will be included. Thoroughly test for viability. Set-up or prepare materials for these activities in advance
Finalize invitation list. Circulate to event leads and internal stakeholders for review

Design event invitation and registration page (e.g. Eventbrite):
  o Determine registration options
  o Privacy information
  o Technology requirements

Prepare work orders:
  o Book a closed captioning service (if applicable)
  o Book an external A/V company (if applicable)

Schedule a tech rehearsal for everybody who is involved in running the event (3-5 days before the event)

Schedule a dress rehearsal for a day after the tech rehearsal that includes everyone involved in running the event plus speakers (1-3 days before the event)

Begin preparing the Book of Words (script, including A/V cues)

Develop a marketing and communications plan, including social media (if applicable)

Plan what content and communication pieces are required for event. Set parameters, expectations and timelines for those creating content.
  o PowerPoint presentation (e.g. welcome slides, agenda, housekeeping)
  o Videos
  o Music
  o Moderator script for chat, including relevant links or information for guests

4 weeks to 2 weeks ahead

If using Zoom, consider setting up a communication channel with A/V team and/or speakers outside of Zoom chat (e.g. WhatsApp or Slack)

Send event email invitation
  o Include registration details (e.g. Eventbrite link) and all event information
  o For security reasons, do not include the event URL (e.g. Zoom link)

Circulate best practices document to speakers/presenters and brief them on their role

Finalize Book of Words, Program Schedule and all content

Ensure work orders are confirmed

Create confirmation email (e.g. see Zoom Meeting and Zoom Webinar samples). Consider including:
  o Outlook/Gmail calendar integration options
  o FAQs, troubleshooting, contact information for technical assistance
  o Privacy and accessibility information, including closed captioning, if applicable
  o Notice of recording (if applicable)
  o Technology requirements
- Outline what type of event this is, whether there will be interaction, what type of involvement/participation is required, etiquette/housekeeping
- Link to Zoom Meeting or Zoom Webinar tips for participants
- Option to attend a pre-event session to test their internet connection, audio and video and practice using some of the interactive tools.
  - This option is especially helpful for events involving demographics less tech savvy or unfamiliar with Zoom and events that are more complex.
- For security reasons, do not include the event URL (e.g. Zoom link)

☐ Create event access email. Consider including:
  - URL to access virtual event including password and call-in numbers (as applicable)
  - Privacy information
  - Contact information for technical support and event enquiries
  - Closed captioning instructions and live stream link (if applicable)
  - Consider sending this email to all those on the original invitation list, even if they didn’t register

☐ Create Post-Event email. Consider including:
  - Post-event survey
  - Thank you message and additional information or resources for attendees
  - A copy of the event recording for on-demand viewing

1 week ahead

☐ Send event link and day-of documents (e.g. Book of Words, Schedules, etc.) to staff, A/V team and presenters as needed
☐ Host tech rehearsal and dress rehearsal – make adjustments to the event program/flow as required

2 Days before event

☐ Send confirmation email to registered guests

1 Day before or day of event

☐ Send event access details email to registered guests (or all invitees)
DAY-OF

For live events (e.g. Zoom):

- Staff and A/V Team log into event a minimum of 45 minutes before event start for final event set-up and testing
- Presenters arrive 30 min before the event start for a final briefing and set-up
- Closed captioner set-up 15-30 minutes before event start
- Turn off auto notifications/pop ups/computer sounds. Set to “Do Not Disturb” mode
- Size windows and script to ensure everything is visible or can be accessed easily
- Test different views or screen sharing to make sure your view isn’t affected
- Backup A/V Tech on standby with AV materials set-up

For pre-recorded events (e.g. livestreams on YouTube or Facebook):

- Chat moderators ready for event start (if applicable)
- Back-up plan with prepared communications if streaming platform goes down

POST-EVENT

- Send Post-Event email to attendees
- Download and save recorded event
- Edit recording. Consider cutting out irrelevant parts (e.g. housekeeping notes, A/V transitions that were not smooth, etc.)
- Publish recorded event
- Consider including the recording and resource materials in the post-event email to attendees for future reference and/or people who were unable to attend
- Consider sending a short event highlight/recap video to attendees in the post event email
- Download attendance and Q&A reports for follow up
- Request debrief notes from event leads and staff. Schedule a debrief meeting (if necessary)
- Reconcile event budget
- Evaluate event success. Were all goals and objectives achieved?