Event Garde Producer Training
Sept. 16, 2021

Contracting

- Prospective clients may submit an interest form on the Event Garde website, contact a team member via email, or we may be responding to a request for proposal (RFP)
- Typically, an Event Garde team member will hold an exploratory call with a prospective client to gather preliminary information about the proposed project
- This information is typically summarized via Dropbox Paper and/or Smartsheet (we call this a scoping document)
- Based upon project need, an Event Garde team member may reach out to you for support
- At that time, the Event Garde team member will likely share with you the scoping document and/or the full proposal (if available)
- Review the scoping document and/or the full proposal (if available); based upon the complexity of the project, you may find that a simple email can resolve any questions you have
- For more complex projects, if interested, schedule a phone call/video meeting to ask questions about the project/your role, including but not limited to:
    - Project rates
    - Level of commitment/time investment (e.g., prep work, meeting time, post work, etc.)
    - Primary Event Garde contact person/team roles and responsibilities
- Once you've confirmed interest/availability, hold the days/times on your calendar, as applicable
- A contract is then drawn up between Event Garde and the client for signature (Please note that the client project is not confirmed until a signed contract is returned to Event Garde. In some instances, this is done quickly. In other instances, it takes weeks. There's also the occasion where the client's needs and/or budget has changed, and the project is released altogether. While your main Event Garde contact will do their best to keep you in the loop, don't hesitate to reach out from time to time for a status update.)
- Depending on the project, and if time allows, an email confirmation or more formal one-page scope of work is usually formatted confirming your participation and the high-level details, including timeline, deliverables and payment
- At the conclusion of the project (or at pre-determined intervals), submit your invoice (including hours worked and a brief description of deliverables) to the following people for review/payment:
    - Your primary Event Garde contact person
    - Aaron Wolowiec (aaron@eventgarde.com)
    - Kara Nacarato (kara@eventgarde.com)
    - Tim Berghuis (tim@eventgarde.com)

Pre-Event

- Familiarize yourself with the project, the group, and the participants. (Request the participant list if it's not been provided to you and peruse the organization's website.)
- Review any session materials (e.g., curriculum, script, slides, polls, etc.).
- Gain clarity on any expectations outside of the standard producer role from facilitators.
- Confirm the dates/times you are to arrive/log in, how long the session(s) will last, including any pre-meeting prep/run throughs, and when you will meet to debrief following the session(s).
- Consider the environment for this particular session(s) (e.g., attire - is this a more formal event/organization), if you'll be on camera (e.g., background), or if you'll be in-person (e.g., comfortable shoes).
- If in-person, confirm location, parking, entrance, floor number, and room name. Additionally, map your route and estimate travel time.
- Be sure you know what technology platforms will be used the day of your session(s), if any, how to access them, any needed login/password information, login links to the video platform, etc.
- Be sure to have practiced, in advance, using/asking questions about any platforms that are new/unfamiliar to you.
- If virtual, test all of the devices you will be using (desktop/laptop preferred as primary device to tablet or mobile phone), including video, sound, and lighting.
    - In lieu of a hard-wired internet connection, ensure the strongest WiFi connection possible (this may mean all others, particularly if you're joining from home, should log off/disconnect).
    - A headset (something as simple as the earbuds you plug into your smartphone) are optimal for better/clearer audio.
    - Be aware of your surroundings. If you're at home, office, public, etc. try to minimize distractions in the background (e.g., young kids, noisy pets, doorbells, distracting backgrounds). Try to find a quiet and calm area to join from.
    - Ensure you have a working webcam designed to be used with your computer for video streaming of presentations.
    - Try to position your camera so it's at eye-level; this may mean propping up your computer on a box or two.
    - An open light source behind you (e.g., windows) will turn you into a shadowy figure (so try your best to avoid this); a light source behind your computer/video camera (e.g., this ring light or a lamp) is optimal.
    - Rename yourself by hovering over your video tile, clicking the … in the upper right-hand corner, and then scrolling down to "Rename"; include, at minimum, your first name, pronouns and the word "producer" (e.g.,Aaron, he/him/his, producer).
- Ensure all other programs/mobile devices you are not directly using for the session are closed/silenced.

- Find out from facilitators what their preferred method of communicating is during the session (e.g., group text, direct message, etc.).
- As appropriate, start a group text with the session facilitators so you can communicate in real time throughout the session.

Event

- Arrive in-person or login remotely to your session before it is scheduled to start. Typically, you will have identified a pre-arranged time with the session facilitators.
- When in-person, there will likely be 30-60 minutes of setup. This may include moving tables/chairs, setting out participant materials, hanging sticky walls, laying out facilitator materials, and the like. Support the facilitation team in getting things ready for the session.
- Once logged in (if virtual), be sure you and all facilitators/staff have been promoted to co-host.
- Help the facilitators troubleshoot any questions/concerns they may have.
    - Check audio, video and screen sharing capabilities for each facilitator, as applicable.
- Ensure you have opened, on your desktop, all appropriate windows/applications and/or that you've printed out all appropriate documents for easy access/quick reference.
- Check to see if there are any poll questions pre-loaded. If yes, verify with your facilitators how they will communicate with you to launch them during their presentation.
    - Take a screen shot/photo of completed poll results. Screen shots/photos should be saved and shared with facilitators after the presentation. Please label the polling screen shots/photos as specifically as possible so they can be later referenced in any client documentation/paperwork.
- Admit/welcome participants at the scheduled start time using the provided attendance list. When in-person, this may also include dissemination of name badges and/or tent cards.
- For remote presentations, type a welcome message into the chat box (note that if you type the message BEFORE people are admitted, participants will not see the message upon admittance):
    - For example: Hi, everyone! My name is _____. I'll be producing this session. Should you have any questions or require any technology support, please connect with me via the chat box.
- When in-person, coordinate with the facilitators the timing and content of your introduction.
- For remote presentations, download and drop any available slides/handout materials directly into the chat during the appropriately identified times. For in-person sessions, identify with the facilitators when each handout should be disseminated.
- Identify the total number of participants attending and share with facilitators following the session for record-keeping purposes. Note any variances in maximum/minimum numbers.
- Take screenshots/photos during the presentation, as applicable, for documentation purposes:
    - For remote presentations:
        - Gallery view of participant faces following a consensus workshop
        - Completed poll results
        - Facilitators speaking with key slides

    - For in-person sessions:
        - Participants posing in front of a completed consensus workshop
        - Completed flipcharts or sticky walls
        - Small groups working together
        - Facilitators speaking in front of a key sticky wall or flipchart
- For remote presentations, actively monitor and respond to the chat conversation throughout the session. As appropriate, share questions directly with facilitators aloud if they go unanswered.
    - Private message any attendees actively soliciting participants in the chat and/or those who may need additional support.
- When in-person, float between tables/small groups during activity times to monitor progress. Provide additional explanation, as needed. Consult with the facilitators on any questions for which you don't know the answers.
- Monitor non-verbal communication throughout the session (e.g., facial cues, camera off, etc.) and voice/follow-up, as appropriate. This is particularly important when consensus is sought.
- For remote presentations, draw people into the session by asking questions in the chat and posting your own reactions, as appropriate.
- Share additional resources via the chat and/or flipchart (e.g., those not pre-determined by the facilitators), as appropriate.
- Take notes / scribe for the facilitators, as requested.
- Discreetly provide periodic time queues to the facilitators.
- Monitor participation from attendees and note any oppressive behavior that may be showing up. Communicate those observations with facilitators during the session/break times, as appropriate.
- For hybrid events, serve as the bridge/advocate between the in-person and remote audiences.

Post-Event

- Complete any post-event follow-up at the request of the facilitators (e.g., transcription of participant-generated content).
- Participate in the post-session debrief following Event Garde's Feedback Model
- Meet with the Event Garde facilitation team to determine next steps (e.g., future producer opportunities, next step in facilitator roadmap)