

Webinar/Simulcast Roles

For the successful production of a webinar or simulcast event, various roles should be considered that will help the event go smoothly. Even if all these roles are assigned and these recommendations are followed, technical issues may still occur but should be minimized.

We will be using the webinar platform to host both webinars and simulcast events, so throughout this document the term “webinar” may be used to refer to the technology being used to conduct the event (in the case of a simulcast event) or referring to a traditional webinar.

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Webinar/Simulcast Roles and Responsibilities

Chapters should consider having more than just the presenter involved in the production of a webinar or simulcast because it will:

- Split the work among several people.
- Allow the presenter to concentrate on the material they will be teaching.
- Help address attendee questions quickly and efficiently.
- Allow for the recognition and quick resolution of technical issues.

Depending on the specific delivery type, you may want to have the following people in place to help with the event, such as a:

- Host(s)
- Presenter(s)
- Question and Answer/Chat Monitor(s)
- Session Monitor(s)
- Technical Contact

Host

Whether you're conducting a simulcast or a webinar, someone should be assigned as the main host for the event. This person(s) will start and run the webinar platform. They may also be the ones that set up the initial webinar and send the applicable links to those participating in the simulcast event (if a chapter is opt in, links may be sent by the national office to the appropriate parties). A host's responsibilities may include the following (Note: Additional hosts could be used to split some of the responsibilities.):

- Introducing the presenter, including a brief biography or their qualifications to speak on the topic. And also introducing any other people that may speak during the webinar, like the host themselves and the Question and Answer (Q&A) monitor.
- Running the webinar program, which may include:
 - Assigning roles and handing the presentation over to the presenter.
 - Monitoring the Q&A and chat features of the webinar and answering questions and/or relaying appropriate questions to the presenter. This may be done either during or after the main presentation as appropriate (this responsibility could also be handled by the Question and Answer Monitor).
 - Launching interactive features of the webinar (e.g. poll questions).
 - Depending on the presenter's comfort with technology, advance the presentation slides.
- Closing the session by thanking the presenter, attendees, and providing any other closing information.
- Running a report on the attendee's feedback and provide that information to the presenter, the education person in charge of running the event, and potentially the chapter board.

Additional Host Considerations for Simulcast Events

Since simulcast events cover more than one location, a host should be present at each location to fulfill some or all the responsibilities below, such as:

- Coordinating with the main location to start and end the session.
- Running the webinar program at their location.
- Relaying appropriate questions to the presenter or the main location via voice or the Q&A feature.
- Serve as a backup, if the main location's webinar connection fails.
- Check registrants in.
- Hand out and collect the sign out sheets at their location (for events that have a Continuing Education (CE) component).

Presenter/Instructor

The presenter is the instructor or speaker providing information to attendees. Multiple presenters may be used during a presentation, but it would be wise to host a few events with a single presenter before attempting to run one with multiple presenters in multiple locations. A presenter's responsibilities are as follows:

- Presenting the material in an understandable manner.
- Providing and presenting materials on the topic they are teaching.

- Developing and utilizing interactive facets of their presentation and using the features of the webinar technology (such as asking people to post questions in the Q&A feature and utilizing polling questions).
- The presenter may also be in control of changing their slides, depending on the instructor's familiarity with the webinar program and how the room is set up.

Question and Answer Monitor (Q&A Monitor)

In many cases it may be beneficial to have someone monitor the Q&A and chat features of the webinar so the presenter can concentrate on the presentation of the topic while the host monitors, troubleshoots and assists in the presentation of the interactive materials. In some cases, the host may also be the Q&A monitor (as for simulcast events that will have a host at each location). The Q&A monitor's responsibilities are as follows:

- Monitor the Q&A and chat feature.
- Answer questions via the Q&A or chat feature as appropriate.
- Relay questions to the presenter and/or host as appropriate.
- Work with others monitoring the webinar, like the host and technical person, to make them aware of any technical issues and help troubleshoot them as they arise.

Session Monitor

Session monitors have a very easy, but extremely important role because they add another level of assurance that the presentation is going smoothly. They simply watch the presentation as a regular attendee would, but their responsibilities in doing this are as follows:

- Monitor the session for technical issues (like sound and visual qualities).
- Contact the host or technical contact if they notice any major issues with sound or visual quality.
 - They should have an alternate way to reach the host other than through the webinar (like a text number) if the webinar chat is not working.
 - This person may have to realize that it also could be their own connection that is to blame for the audio and visual quality.

Technical Contact

Every session done via a webinar platform, whether it's a simulcast or a webinar, should have a technical contact. The technical contact's main job is to be familiar with the webinar platform and common issues people have with accessing the webinar platform, whether they are the host or an attendee. They should also be familiar with running a webinar or simulcast so they can provide guidance when issues occur.

Most technical issues will likely revolve around common issues, such as a lost link, logging into the webinar, or accessing the presentation materials. Generally, these are easy issues to resolve. This person should be familiar with where to find information on troubleshooting common problems.

Lastly, make sure everyone running the sessions, especially the technical person, has a contact list that is up to date that includes mobile phone numbers and emails, to make contacting people easier during troubleshooting.

Summary

With the right people in place, webinars and simulcasts can be easy and effective to run. People can fill multiple roles with some experience, minimizing the number of people needed to run each session, but it is advised that you start small gaining familiarity with the roles before taking on more. As with any technology, familiarity with the platform you'll be using, testing, and performing multiple dry runs, will help ensure a successful event.

Webinar Technical Guidelines

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Webinars provide a unique way to reach chapter members on one of the most requested topics; state education. Utilizing technology to broadcast a presentation from one location to numerous personal computers will allow a chapter to reach members in a timely manner no matter where they are in the world. Due to the time required and nature of the presentations, if done right, it should keep costs low and provide education to a wide audience across the nation.

The following documentation speaks to many of the technical aspects or set up of presenting a webinar but will not go into detail regarding the presentation of materials through this format.

Computer

There is a list of technical requirements for the webinar platform, based on the type of computer you will be utilizing. Please see your webinar platform's list of requirements ([GoToWebinar's Webinar Support page](#)) before hosting a webinar. These requirements may change over the course of time and with new technology, so checking these requirements occasionally will provide the best outcome for your webinar.

Internet Access

It should be obvious that internet access is required to run a webinar since it's an online event, but because of the potential to have unreliable internet access, decreasing any concerns around reliability is important. To help maintain a more reliable presentation it is recommended you use a hardwired internet connection whenever possible (which means plugging the computer into the internet instead of using WiFi). Wifi is **NOT** recommended because it has a higher likelihood of dropping the internet connection and therefore failure of the webinar.

If your only option is to utilize WiFi at a location, it may be worthwhile noting the following:

- The reliability of the service.
- Being on a different wireless network than the rest of the location you're at (e.g. being on the locations business network, rather than their general guest network).

Internet Speed

Additional information you also need to consider regarding a recommended internet speed related to running the webinar platform can be found on your webinar's support page ([GoToWebinar's Webinar Support page](#)).

Webinar Session

The webinar session is a specific event that will occur on a given day and time. Correct utilization of this session is critical in having the webinar session active at the time you go live with the webinar because if you use the session incorrectly you could "activate" it and not be able to use it when you go live. To help alleviate any issues there are a few important things to consider:

- **Dry run your webinar.**
 - **Do not use anything but practice mode when doing a dry run.**
 - Using anything but practice mode will make the live event links invalid at the time of the live event.
- Only use the live webinar when you are going to go live with the event.

- Know the webinar program, it's features, and how to operate it before conducting an event, this not something you can learn on the fly.

Presentation

The presentation is at the heart of why people are attending the webinar. Uploading the presentation to the webinar handouts can help provide some backup in the event of a program failure but can also provide attendees with a download they can print at their convenience. Additionally, making sure that other organizers also have a copy of the presentation is important because it would allow the presentation to go on, even if the presenter loses their computer. If the presenter was able to keep their audio, another organizer could share the slides while the presenter continues to go through their material. This is somewhat dependent on how the audio is accomplished so additional information about how this can happen is included in the audio section.

Presentation Screen

Familiarity with the use of a “clean” presentation screen within the webinar platform will limit the sharing of any information that may be shown mistakenly on the presenter's desktop.

Webinar Roles

Multiple people may be needed to effectively run the webinar, such as the organizer, presenter, technical roles and other recommended roles. Understanding of these roles, that these people do not need to be in the same location, and that they should conform to fulfilling specific job duties will help the webinar run smoothly. More in depth knowledge of the various roles, in addition to familiarity with the webinar features will also play a large part in the presentation. These roles and features are covered in additional documentation on the running of a webinar.

Camera

It is not advised to conduct your first webinar with a camera as it can add a level of complexity to the new webinar presenter. If the presenter is familiar with delivering presentations online, showing the instructor on camera can create a more personalized experience. If you will be using a webcam an HD webcam will present viewers with the best picture. And although the webcam in the laptop may be an HD device, a separate webcam is recommended because it:

- Typically has a wider angle of view.
- Can more easily be positioned in the room (like on a tripod)
- Is more easily adjusted.
- May have other features the laptop camera may not have (like some webcams can follow the instructor if they tend to move a little, even when sitting stationary).

Camera position is another important factor, some aspects to consider are:

- Testing the lighting
 - Too much backlight.
 - Not enough light.
- Placing the camera directly in front of and around eye level of the instructor/presenter.

- Background behind the presenter; busy rooms and windows behind the presenter can cause some challenges.
- What the instructor is wearing can also be an issue. Some clothing examples:
 - Stripes may be hard to look at and not appear well on camera.
 - Consider what may happen if the instructor has to stand up to adjust the camera during the presentation.
 - No V-necks.
 - Appropriate full dress.

Audio

Although the audio for the webinar can be broadcast through the computer, utilizing VoIP (Voice Over Internet Protocol) a dial in option through a land line is preferred because if the presenter's webinar program or WiFi drops, another organizer can share their copy of the presentation while the presenter continues with the material. A mobile phone is another option, but the presenter should be familiar with the dependability of the coverage in their area to minimize dropped calls.

If a host or presenter wants to use VoIP, they will need a microphone, preferably one that connects directly into the computer. Wireless microphones are also a good option for use in a VoIP setting, allowing the instructor/presenter to freely move around without being attached to their computer although, understand this technique introduces another potential technical failure point to your presentation (many times due to battery failure, so have backup batteries available).

Summary

Webinars have some challenges, but the challenges should far outweigh the benefits that chapters can gain from providing state and practice management education to members in their own homes and offices. Webinars can reach members where they are, create more frequent learning opportunities, and provide a service that other organizations don't provide. Much of the success of these events is predicated in the appropriate handling of the technology involved, being familiar with the webinar platform and getting the right people in place to run each event, so testing all these factors multiple times and completing dry runs are critical to their success.

Simulcast Guidelines

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Simulcast events provide a unique way for chapters to simultaneously get members together in more than one local area while utilizing technology to broadcast a presentation from one of the locations to all the other locations. Due to the time required and nature of the activities, if done right, it should keep costs low and provide education to a wider audience.

Since at least two locations need to be considered and some recommendations apply to both location types, the following recommendations are split into three sections.

- Presenting and satellite locations
- Presenting locations
- Satellite locations

Presenting and Satellite Locations

Both the presentation and satellite locations have a few requirements in common, so the following recommendations need to be considered for all locations.

Computer

Different recommendations exist based on the location, but one constant between all locations is the list of technical requirements for the webinar platform, based on the type of computer you will be utilizing. Please see the webinar platform's webinar support page ([GoToWebinar's Webinar Support page](#)) before hosting a simulcast or webinar.

Internet Access

Internet access is required to run a simulcast event because it is run through a webinar platform. Because of the potential to have unreliable internet access, limiting this factor is one of the primary concerns in hosting a simulcast event at all locations. To help maintain a more reliable presentation, especially to the satellite locations it is recommended you use a hardwired internet connection whenever possible (which means plugging the computer into the internet instead of using WiFi). Wifi is **NOT** recommended because it has a higher likelihood of dropping the internet connection which has a higher possibility of failure.

If your only option is to utilize the WiFi at a location, it may be worthwhile asking about the following:

- Reliability of the service.
- Refunds on the location if the internet fails.
- Being on a different wireless network than the rest of the location (e.g. being on the locations business network, rather than their general guest network).

Internet Speed

Additional information you also need to consider regarding a recommended internet speed related to running the webinar platform can be found on the webinar platform's webinar support page ([GoToWebinar's Webinar Support page](#)).

Webinar Account

The webinar session is a specific event that will occur on a given day and time. Correct utilization of this session is critical in having the webinar session active at the time you go live with the webinar because if you use the session incorrectly you could "activate" it and not be

able to use it when you go live. To help alleviate any issues there are a few important things to consider:

- **Do not use anything but practice mode when doing a dry run for the simulcast event.** Using anything but practice mode will make the live event links invalid at the time of the live event.
- Only use the live webinar when you are going to go live with the event.
- Know the webinar program, it's features, and how to operate it before conducting an event using the webinar platform, this not something you can learn on the fly.

Presentation

The presentation is at the heart of why people are gathering at a specific location. Uploading the presentation to the webinar handouts as well as providing a copy of it to each location can help provide backup in the event of a webinar platform failure or an individual location failure. Even with a platform failure it may still be possible to carry out the session using the audio and having someone at each location presenting their copy of the presentation on the satellite location's screen if each location has an electronic backup.

Presentation Screen

A presentation screen should be used at each location to present the materials on screen. The screen should be large enough for all attendees to easily see the presentation. Additionally, the screen must be able to work when connected to a laptop.

Registration Lists and Sign Out Sheets

Registration lists and sign out sheets need to be used at each location to provide evidence that attendees were at the specific location and sessions in order to get credit.

Session Monitor(s)

An individual will be needed at both the presenting location(s) and the satellite location(s) to do the following (these duties may be split up among several individuals):

- Coordinate/run/set up the technology.
- Check attendees in using the registration list.
- Pass around the sign out sheets.
- Monitor the question and answer or chat features on the webinar platform.
- Receive questions from the audience and relay them to the presenting location.
- Turn on and off the sound at each location in order to relay verbal questions (if necessary).

Presenting Location(s)

The following recommendations are based on a single location presenting to other satellite locations. If multiple locations will be presenting or sharing back and forth between locations via voice and video (rather than just through the chat or question and answer feature), they are also considered presenting locations, and the same recommendations apply.

Computer

At least one computer will be needed, however, two computers may provide the best experience for those running the session, attendees and the presenter. The reason for this is due to technology management, which in turn will present a better user experience for all parties.

One Computer

If one computer is used for the presenting location, this can be done, but it's not recommended because it requires a bit more technical patience, ability to multi-task and expertise with the webinar platform. Some requirements for a single computer are:

- Familiarity with the extend desktop feature of the computer, which would allow the operator to:
 - Display the presentation on the main screen.
 - Simultaneously manage the video, Q&A and other features on the laptop screen.
- Familiarity with how to operate the webinar platform and switching back and forth from the presentation to change slides, while also monitoring the Q&A and chat features.

Although using one computer can be effective, the drawbacks of using one computer are:

- The instructor must have the host that is managing the webinar platform, change their slides for them.
- Operating the other features of the webinar platform simultaneously with changing slides on the presentation, because it often requires the operator to go back and forth between multiple applications or screens.
- The placement of the computer in the room, due to camera and microphone placement, in addition to where the host may have to sit to run the presentation.

Two Computers

Two or more computers usually present the ideal situation because it may allow for better technology management, such as allowing:

- The instructor/presenter to control their own presentation.
- The instructor to concentrate on presenting the topic and not being distracted by having to check the webinar platform for questions, monitoring the chat, etc.
- For better microphone and camera placement.
- The host(s) to more easily monitor the Q&A, chat, camera and other webinar features.

Although these guidelines are not meant to be a "how to" guide, an example of how two computers could better manage the technology are as follows:

- The instructor can log onto the webinar platform at the front of the room and share their presentation, both on the screen at the front of the room and via the webinar platform to the other locations.
- The host can use their computer and webcam to run the video so the other locations can see the presenter/instructor, while also managing the Q&A or chat features on their laptop. Most people think the video would also need to be on the laptop screen, but this isn't the case, the video can be run while other things are on the hosts screen due to technology in the webinar platform that "hides" the other webinar features and doesn't broadcast them to the other locations.

Note: How to handle the audio is handled in the Audio section.

Camera

An HD webcam will present the viewers with the best picture. And although the webcam in the laptop may be an HD device, a separate webcam is recommended. A separate webcam typically has a wider angle of view, can more easily be positioned in the room (like on a tripod), is more easily adjusted or rotated to follow the instructor if needed, and may have other features the laptop camera may not have.

Camera position is another important factor, some aspects to consider are:

- The overhead display and the creation of too much backlighting.
- Placing the camera to one side of the room or the other.
- Placement of the camera in the middle of the room.
- Traffic patterns around the camera placement.
- Cord lengths and exposure.

A tripod for the camera may be beneficial to have depending on the room set up. The tripod can be placed on the floor or on a table to present the best viewing angles for the remote locations. Testing the lighting and position of the camera are also important in determining the best camera placement and if lighting should be added or removed.

Audio

Chapters have several options to consider that will provide good audio. Since live attendees will be in the room with the presenter, the audio considerations for the people in the room and their ability to hear the presentation are the same as any live event. The more challenging part is ensuring good audio is being broadcast to the remote locations. This may entail a little more practice and planning. Some audio options are:

- Dial into the webinar with options provided by the location.
- Use a microphone through the computer.
- Use a headset on a mobile phone.

The room set up, resources you have available, and many other factors will help determine the optimum set up for your situation. For example, if you were to use an external microphone that's wired to the computer, your presenter may be contained to a single spot in the room.

The dial in option is preferred because if the webinar platform drops, the locations will still have audio and, although not ideal, the webinar could go on with each location presenting backup slides on the presentation screens at their individual locations. If a host or presenter wants to use VoIP (Voice Over Internet Protocol or audio through the computer), they will need a microphone, preferably one that connects directly into the computer. Wireless microphones are also a good option for use in a VoIP setting, allowing the instructor/presenter to freely move around.

Tape

What would you possibly need tape for? To help the instructor stay in frame of the camera, marking the floor with a colored masking tape is effective and should cover the full view of the

camera (don't forget the instructor may need guidance in all four directions; left right, forward and backward).

Tape may also be needed to tape cables to the floor to prevent trip hazards and to hold them down to desks or elsewhere when necessary.

Satellite Locations

Satellite locations are almost more important than the main location because combined, they're likely to have more participants than the main location. A basic checklist for the satellite locations is as follows. Can attendees:

- See the presenter at the presenting location?
- Hear the presenter at the presenting location?
- See the presentation?

How you accomplish most of these items have been covered because they relate to both the main and satellite locations, however, there is one critical factor to consider at a satellite location that hasn't been covered yet, which is audio.

Audio

The visuals of a presentation often mean very little without the context the presenter is providing so the audio portion of your presentation is very important. There are several ways to accomplish the audio at satellite locations, but what method that is used will entirely depend on the room set up and available resources.

Ideally, the room set up will allow for the audio to be piped into the room through the computer or via a phone and into a speaker system in the room. If this is not the case, depending on the size of the room and audience, computer speakers may be necessary. Testing to determine the best setup, considering room noise and configuration, and the ability to adjust the volume are of the utmost importance because it will provide the best attendee experience.

The ability to broadcast audio from a secondary location is not recommended, but it could provide some additional benefits. This is covered further in the camera section next.

Camera (Optional)

A camera is typically not necessary at satellite locations unless they will also be hosting a portion of the presentation. There are some benefits to having a camera and audio at the satellite locations, but it would only be for specific reasons and should only be approached if you are very familiar with running this type of an event. Camera and audio at the secondary locations can provide some benefits such as:

- The audience and presenter seeing the satellite locations, reminding them they are not the only ones attending this presentation.
- Reminding the instructor to also talk to the satellite locations and ask for questions from them.
- A means to visually see if people have questions at the satellite locations. This can be accomplished by providing an audience camera angle/view and providing the audience with a bright florescent sheet of paper to hold up if they have a question. When called

on, the satellite location can then unmute and have the attendee ask their question or ask the question for the attendee.

Summary

Simulcast events have some additional requirements over a live event and can take more people power to run, but they can have a lot of great benefits, like reaching members where they are, creating more frequent small gatherings, and providing a less expensive educational experience. Much of the success of these events is predicated in the appropriate handling of the technology involved, being familiar with the webinar platform and getting the right people in place to run each location. Thus, testing all these factors multiple times and completing dry runs are critical to their success.