

PACIFIC REGION 2 WEBINAR PROCEDURES AND RESPONSIBILITIES

PURPOSE: This document describes the responsibilities and procedures for conducting a Webinar or Teleconference in Pacific Region 2. This document focuses primarily on Webinars since it is anticipated that Webinars will be the main conference type. However, if Leaders desire to have a Teleconference instead, they should follow the same procedures to schedule it. Obviously, Teleconferences do not require as much coordination and effort to conduct as Webinars. The process of scheduling, planning, and conducting a basic Webinar is very straightforward and requires minimum effort on the part of participants to conduct.

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RESPONSIBILITIES:

Pacific Region 2 Administrator. The Pacific Region 2 Administrator is [Larry Metz](#), CA1. The WebEx license belongs to the Administrator. The Administrator has overall responsibility for use, eliminating scheduling conflicts, webinar help and assistance, and training of Assistant Administrators.

The Administrator backs up the Assistant Administrators (AAs) when they are not available to schedule or Host a meeting.

Should there be a surge of requests for Webinars at one specific time, the Administrator can look to other sources for Webinar scheduling, i.e., using the Pacific Region 1 license, other Regional Licenses, or the HQ AARP Tax-Aide license.

When Webinars are started, the Host will appear as, PacReg2 Host. This is to help identify the person scheduling the meeting.

Pacific Region 2 Assistant Administrators. There are four Pacific Region 2 Assistant Administrators. They are:

- CA1 – [Sue Schneckloth](#)
- CA2 – [Bill Dornbush](#)
- CA3 – [Ben Kelly](#)
- UT1 – [Les Kappel](#)

The Assistant Administrators have the same privileges in WebEx as the Administrator, as they use the same username and password.

The Assistant Administrators can utilize the Administrator or one of the other Assistant Administrators when they are unavailable to schedule or Host a meeting.

The Assistant Administrators are responsible for working with the State Coordinators to promote use of Webinars. They should conduct an information Webinar(s) with their SCs and other state leaders that the SC may want to include.

The Assistant Administrators are the state points-of-contact for Tax-Aide leaders within their sub-state who wish to conduct Webinars. Leaders wishing to conduct a Webinar should send a Pacific Region 2 Webinar Scheduling Request to the applicable Assistant Administrator. The Assistant Administrator provides the following assistance upon receiving the request:

- Contacts the requestor to understand the specifics and determine any training that may be necessary
- Schedules the Webinar per the requestor's desires
 - **Always put your sub-state at the beginning of the Webinar title**, e.g., if you are the CA3 AA scheduling a pre-season meeting for the XXX Lodge, enter the title as, "CA3 Pre-Season Webinar for the XXX Lodge."

- This takes the ambiguity out of the scheduling process. In the example, everyone will know that it is a Pacific Region 2 Webinar scheduled by the CA3 AA. Thus, if there are any conflict or questions, the responsible person is quickly identified.
- Forwards the meeting scheduling message to the Leader
- Does one of the following per agreement between the AA and the Leader
 - Starts and Hosts the meeting
 - Starts the meeting and turns over the Host role to the meeting Leader, then exits the meeting
 - Turns over Host duties to the meeting Leader
- Trains the Leader to conduct the Webinar, as required
- Trains Presenters to conduct their presentation, as required
- Moderates the meeting if requested by the Leader
- Participates in Webinar session practice, if requested
- Sets up individual meetings, if requested
 - Starts meeting
 - Uploads presentations
 - Introduces meeting specifics to Participants

Leader. Leaders are responsible for overall conduct of the particular meeting. They receive the meeting scheduling message from the AA and forwards it to meeting Participants. The Leader can open and Host the meeting or they can request the AA do these tasks. The Leader coordinates with the Host and Presenters to assure proper preparation and organization for the meeting conduct. The Leader participates in the Webinar by assisting the Host during the meeting.

Host. The Host is the person who conducts the meeting. Usually, the Host will be the meeting Leader and accomplish the Leader tasks.

Presenters. The Presenter is the person who is given the duty to present one or more topics at the Webinar.

Participants. The Participants observe the presentations and participate via chat or asking questions and providing comments, directly.

REQUESTING AND PREPARING FOR A WEBINAR:

Pacific Region 2 Webinar Scheduling Request. The leader desiring to conduct a Webinar should contact the applicable AA who will send them a scheduling request to be filled out and submitted.

Scheduling the Webinar. Upon receipt of the scheduling request, the AA will schedule the meeting and forward the meeting notification message to the meeting Leader for distribution to meeting attendees. The AA will also provide training to the Leader/Host, as required.

[Preparing for the Meeting](#). The **Leader** is the primary go to person for the meeting. They must do the following, once the meeting is scheduled:

- Decide on the type of meeting, call-in or VoIP
- Forward the meeting notification to the Participants
- Identify the content of the meeting, i.e., the order of presentations, the presentations, and the presenters
- Train the Host/Presenters in conducting their portion of the meeting
- Arrange for dry-runs/practice sessions for the Host and Presenters
- Determine if Participants will be allowed to interrupt presentations with questions, have a question session after presentations, or submit questions by chat during presentations
- Determine if Participants phones/microphones are muted during presentations
- Determine if the Leader and/or Host will take chat questions from Participants for Presenters when phones/microphones are muted
- Determine if a Poll will be conducted at conclusion of the presentations
- Create the Poll, if one is to be conducted

CONDUCTING THE WEBINAR.

[Responsibilities of Various Roles](#).

- The **Leader** is responsible for the following:
 - All presentations are pre-loaded into WebEx and Presenters are present
 - Assure the meeting is started on time and ended within the meeting time limit
 - Introduces him/herself and the meeting Host and Presenters
 - Displays and discusses the agenda
 - Explains how Participants can interact, i.e., chat, take and save notes, ask questions, “raise their hands,” etc.
 - Explains how Participants can download meeting documents
 - Control the flow of the meeting, i.e., give presentations, introduce presentations, take questions, mute/unmute phones/microphones as required, submit the Poll at the end, show the Poll results after the Poll is closed
 - Recording the meeting, if desired
- The **Host** is responsible for the following:
 - Usually the Host is also the Leader. If the Host is not the Leader, then the Leader and Host should agree which of the Leader’s responsibilities will be split amongst them
 - Introducing the Presenter and transferring the Host role to the Presenter
- The **Presenters** are responsible for the following
 - Being familiar with their participation functions
 - Having their presentations uploaded prior to the meeting start
 - Returning the Host role to the Host when finished with their presentation

CONCLUDING THE WEBINAR

At the end of the webinar, the **Leader** does the following:

- Announces the conclusion of the meeting and asks if anyone needs to download any documents
- Stops the recording
- Tells Participants he/she will provide a message with the Internet location of the Webinar recording
- Ends the Webinar
- Goes to the WebEx website to generate a message to attendees with the location of the Webinar recording

TIPS AND CAUTIONS FOR THE WEBINAR PROCESS

Following are some things to consider when preparing for and conducting the Webinar:

- In general, do not allow video. It can slow down the meeting and creates a huge recording if you record the meeting
- For long meetings, warn people that they should have a fully charged cordless phone or cell phone
- If you don't mute all phones, request that people mute their phones during the meeting to avoid barking dogs, barking spouses, and other disruptive background noises
 - Inevitably, everyone won't and someone will disrupt the meeting. As Leader/Host, you can see where the noise is coming from and mute the phone/mike, if appropriate
- If you have a large audience, you may wish to mute all phones and take questions via chat or "raised hand." Otherwise, people are going to be talking over each other.
- When asking for questions, always remind people to "Unmute your phone"
- If you are going to conduct an extremely long meeting, you may want to present a VoIP meeting to avoid depletion of phone batteries.
- There is nothing wrong with a VoIP meeting, but you must make sure that all Participants have this capability and know how to use it. Feedback between mike and speakers is always a possibility and, for this reason, a headset is recommended.
- You should point out to Participants that a combined microphone/headset is desirable whether using a phone or VoIP to allow them the freedom to manipulate their computer or take notes
- When saving meeting documents the default Save type is in .ucf format. Make sure that Participants understand they need to change the default to .pdf. Otherwise, they will not be able to open the documents.
- Since it is not possible to save documents in their original format, i.e., .docx, .xlsx, .ppt, etc., the Leader/Host should explain that anyone wanting those documents should request them from the Leader/Host. Many times, Participants will want to modify them for local use.

DEFINITIONS.

Terms used in this document are described, below.

- [Call-in Webinar](#). A call-in meeting is conducted via telephone. The Participants enter the Webinar via the Internet address and then will be prompted to either call-in or have the system call them. It is highly recommended that Participants have the system call them back for ease of identifying who is speaking.
- [Teleconference](#). A teleconference is conducted by phone, only. Participants are not required to use the Internet for a presentation.
- [VoIP Webinar](#). VoIP meetings are conducted with the Participants using a microphone and speakers/headsets connected to their computer. CAUTION: All participants will have to have a microphone and speakers or headset to participate in the meeting. They will also have to know how to use the devices. A mixed call-in and VoIP meeting is not an option.
- [Webinar](#). Internet video presentation and teleconference, combined. Webinars are led by Hosts/Leaders with people providing audio-visual presentations to an online audience.