| **Checklist for Introducing Chapter Events** | | |
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| Before the Event Begins… | | |
| 1 | Ask the speaker how s/he would like to be introduced. | *[Notes about the speaker(s)]* |
| 2 | Ask presenter(s) to give you the floor at the end of the presentation so you can make concluding remarks. | |
| 3 | Check to see if the venue host would like to make any remarks. | |
| 4 | Circulate among participants and make sure they engage with audience response technology. | |
| Begin the Event on Time… | | |
| 1 | Greet the group and thank them for attending. | |
| 2 | Introduce yourself and briefly explain your role on the Board. | |
| 3 | Refer to the handouts that were distributed to each registrant upon arrival | |
| 3A | Power Membership Flyer  Announce the opportunity to become a member of National ATD.  *“National membership complements your local chapter membership by giving you access to research, books, foundational curriculum, best practices, 10 specific communities of practice, and other professional development events.”*  Provide one personal reason why you appreciate your power membership.  Announce that you can respond to questions about Power Membership after the event.  Invite those who are interested to go to our website to sign up and get a terrific discount. | |
| 3B | Upcoming Events Flyer  Announce two or three upcoming events from the flyer:  Next month’s learning event  One of the professional development opportunities from National ATD  An upcoming event that you are looking forward to attending  The annual conference (November 9th, at the Airport Sheraton, with keynote Jim Smith Jr.) | |
| 3C | (optional) Highlight the eLearning SIG and / or Career Focus SIG. | |
| 3D | Describe the Chapter Incentive Program (ChIP)  *“ChIP is a revenue-sharing program. Whenever you make purchases from National ATD, we get a small commission, which we use to deliver more events and professional development opportunities for you.”*  Qualifying purchases include:   * Tickets to National ATD conferences * Certificate programs and other learning events put on by National ATD * Books and research reports from the National ATD online bookstore   “Be sure to select the Cascadia chapter code 8029 from the drop-down menu during checkout.” | |
| 4 | Finally, encourage the participants to consider volunteering for the chapter. Invite attendees to talk to you about volunteering after the presentation. | |
| 5 | Introduce the speaker(s). | |
| At the conclusion of the event…. | | |
| 1 | Thank the speakers. | |
| 2 | Thank the participants for attending. Provide instructions for completing the workshop evaluation. | |

Instructions for Managing the UMU Interface Throughout the Program

1. Upon arrival, ask the speaker to log in to the wifi connection and then go to UMU.com.
2. Log in to the ATD Cascadia account in UMU. Login is [info@tdcascadia.org](mailto:info@tdcascadia.org). Password is CHIP8029 (our chapter incentive code).
3. Chose the event (should come up automatically).
4. Click on the event title.
5. You should be at the page that has three “surveys” (whatever the first survey is titled – changes with each session, Q&A, Evaluation).
6. Select the first survey and click on Display.
7. This survey was created using questions provided by the speaker.
8. **BEFORE THE PROGRAM STARTS**: Encourage the participants coming in to take the survey. Tent cards with login instructions will be on the tables. The participant just needs to go to UMU.com and enter the PIN of CHIP8029.
9. Just before the program gets started, click on Next to show the results.
10. The speaker may choose to review the questions and respond as they get started or just review the questions and keep them in mind for use during the event.
11. Once that process is done, advise participants to click Next on their mobile device. You can simply Close the Session and turn the screen back over to the speaker.
12. DURING THE PROGRAM: If the speaker is willing and the group dynamics might support it, we have the ability to have organic questions from the participants in the Q&A section.
13. Instruction the participants to go to their mobile device and enter any questions they want. They can enter multiple questions throughout the session. They can also “like” other questions which will make those questions more popular.
14. To view the results at one time or throughout the presentation, the speaker can return to the UMU tab and click on Display next to the Q&A section.
15. There are several ways the responses can be shown…as tags or circles. You will also see which questions are asked the most. Use the Next (>) icon to move through the screens.
16. To close this process, click Next and End the Session.
17. AT THE END OF THE PROGRAM: Click Next and ask participants to complete the Evaluation. There’s no need to show the results. The results will be automatically recorded and can be downloaded later.

For questions, contact Emily Ullberg, UMU Account Executive, 503-887-6356.