

## Event Guidelines

CFA Society Los Angeles' Board of Governors has requested that the society do less programming and have higher impact events. The Board plans to continue with a mix of both virtual and in-person events. CFALA Staff will work with programming to keep the balance. With that in mind, please reach out to the CFA Society Los Angeles Office to discuss whether your event should be in-person or virtual.

### 1. Timeliness of Information

- Event planning form, description of event, and speaker info should be submitted at the same time in one email to [info@cfala.org](mailto:info@cfala.org).
- All information should be submitted 6-8 weeks prior to the date of the event. If you are doing an in-person event, 8 weeks is preferred so we have time to get a venue secured. Because of COVID it has become more challenging to secure venues.
- If we DO NOT receive any information 4 weeks prior to the event, we will release the hold on the calendar date.

### 2. Event Details

- Event Titles cannot be changed once posted to the website
- Event descriptions should be about a paragraph (4-5 sentences) with no more than 5 bullet points following.
- Speaker information should include a Bio, official title, full company name, a high-quality headshot (at least 1MB jpg), and any relevant designations.
  - Bios and Headshots should come directly from the speaker or the speaker's assistant/agent/etc. Please do not pull bios and headshots from the internet as they may not be accurate or what the speaker wants.
- Logos and descriptions of cooperating organizations also need to be submitted
  - Cooperating organizations must be reviewed by the CEO prior to posting the event
- Networking sessions (with or without breakout sessions) are encouraged

### 3. Speakers

- As a general rule, CFA Society Los Angeles does not pay for speakers. Special exceptions will be considered by the CEO on a case by case basis.
- It is highly encouraged the panels be diverse. Volunteers should look for speakers from different backgrounds, gender, age, etc. Moderators should be selected to best balance the panel. We encourage volunteers to search for a moderator before selecting within the group.
- Speakers will be registered for free. If the event is online, they will be provided a zoom link via a calendar invite (if in Zoom Meeting) or email (if in Zoom Webinar).
  - Speakers may bring up to two guests for a virtual or an in-person event for free. First Name, Last Name, and Email must be sent to CFALA Staff by 9am the day before.

### 4. In-Person Events

- Venues, F&B Minimums, AV, and all other costs associated with an in-person event have increased.

### 5. Date/Time confirmation

- Prior to setting up the event and reaching out to speakers/panelists, dates and times must be run by CFALA staff to ensure there are no conflicts
- Confirm how long the speaker discussion/panel will occur. The standard for a panel is 1.5 hours and for a single speaker is 1 hour. We set CE/PL Credits by this so please make sure to confirm.

### 6. Registration

- Typical registration prices for virtual events are FREE for Members and \$20 for Non-Members. Typical registration prices for in-person events are \$25 for Members and \$75 for Non-Members. Pricing may change based on changes in expenses and sponsorship.
  - For virtual events, since most are free for members, it is expected that all Advisory Council Members (ACMs) who are also members of the society

register themselves. If there is a cost associated with the virtual event, a coupon code will be shared with ACMs so that registration is free.

- For in-person events, ACMs who had a significant impact in creating the event may attend for free. It is the Chair's responsibility to notify CFALA Staff by 9am the day before.
- ACMs are not allowed to bring guests for free. They are expected to register and pay for any event they attend.

#### 7. Recording the event

- CFALA is trying to provide as much content to our members as possible. We highly encourage that ALL events be recorded.
- We expect all organizers to reach out to speakers prior to confirming them to make sure they are comfortable with being recorded and with CFALA's speaker agreement.
- All speakers on a panel must sign a speaker agreement in order for the panel to be recorded

#### 8. Prep Calls

- For both in-person and virtual events, it is highly recommended that you have a prep call with all speakers, moderators, and committee members (as applicable).
- Prep calls can be paired with Zoom test meeting if your event is virtual
- Some of things you should discuss in prep calls:
  - Topics/Questions for the discussion
  - Order of events (i.e. how long the event is, how long each person should speak, etc.)
  - Presentations or Polls being utilized
    - It is very common that attendees would like to review the presentation materials after the event. You should check if the speaker is comfortable with sharing their presentations slides. They may need to check with compliance so it is great to do this prior to the event so the materials can be distributed after the event if applicable.
    - Any poll questions should be submitted by 9am the day before so they can be uploaded into the zoom meeting/webinar or in "slido" for in-person polling.
  - Location (in-person/virtual)
  - Time (when to arrive)
  - Dress code (if applicable)
  - For Advisory Council members: who is kicking off the event, who are the sponsors and are any sponsors designated to speak during the event (if applicable)

#### 9. Test Zoom Meetings

- Please schedule with CFALA a prep session at least 5-7 business days prior to the event. Email [info@cfala.org](mailto:info@cfala.org)
- Speakers may not be used to zoom formatting (as they may utilize a different application).
- Test meetings are required to ensure a quality event. This is especially important if speakers are planning to utilize presentations or other technology. Best Practice guidelines should also be discussed (See Additional Form)

### CFALA Event Planning Form

Events will not be posted to the website until all information is received. Please send to [info@cfala.org](mailto:info@cfala.org) in a Word document the speaker bio and event description text that you would like posted on the website. Please do not format with bold, italics, special margins, etc.

Event Date: \_\_\_\_\_

Event Title: \_\_\_\_\_

Event Description:

***Reminder:*** Event descriptions should be about a paragraph (4-5 sentences) with no more than 5 bullet points following

Speaker(s) (including emails):

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

Chair(s): \_\_\_\_\_

Chair(s) Email: \_\_\_\_\_

Cooperating Organization(s): \_\_\_\_\_

Sponsor(s): \_\_\_\_\_

Event Size: ☐ Under 50 ☐ Under 100 ☐ Under 300 ☐ Under 500

Time of Event: \_\_\_\_\_

**\*\*In-Person** events typically run from 4pm-7pm with the speakers/panel going from 4:30pm-6pm. Please confirm the run time with CFALA Staff and speaker(s). **Virtual Events** typically run from 4pm-5:30pm with an hour of presentation and 15 minutes to 30 minutes of Q&A and/or Breakout Sessions.

*Go to next page to for Technology and AV Requirements*

### Technology/AV Requirements:

#### Virtual Events: Zoom Meeting vs. Zoom Webinar

- **Zoom Meeting:** This is when you want to utilize breakout rooms, want attendees to be able to talk and overall be more interactive. Please note that you can use polling, breakout rooms, and allow attendees to speak freely
- **Zoom Webinar:** This is when you want to focus on a panel or speaker and utilize the Q&A feature. Unlike zoom meeting where attendees are limited to chat, the Q&A feature allows speakers to view and sort questions. This does not allow free talking to regular registrants nor can you use breakout rooms.

Will you be utilizing Zoom Meeting or Zoom Webinar? \_\_\_\_\_

If using Zoom Meeting, do you want breakout rooms? ☐ Yes ☐ No  
Do you wish to utilize Polling (Zoom Meeting & Zoom Webinar)? ☐ Yes ☐ No  
Will you be recording the event? ☐ Yes\* ☐ No

\*By checking the "Yes" box, you agree that you have already reached out to speakers and that they have agreed to be recorded and have reviewed the speaker agreement.

#### In-Person Events: Technology/Set-up Requirements

- **AV Requirements:**
  - Will your speakers be utilizing a PowerPoint presentation? ☐ Yes ☐ No
  - What set-up do you want for your speaker(s)? Select all that apply:
    - ☐ Podium ☐ Panel Set-up (chairs/table) ☐ Fireside Layout (two chairs w/out table) ☐ Other: \_\_\_\_\_
- **Seating:**
  - ☐ Theater Style ☐ Roundtable ☐ Other: \_\_\_\_\_
- **Recording:**
  - Will you be recording the event? ☐ Yes ☐ No

\*By checking the "Yes" box, you agree that you have already reached out to speakers and that they have agreed to be recorded and have review the speaker agreement.

Additional Comments: