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CPGR Outreach Host Responsibilities

A. Marketing:

1. Promote the CPGR programs to constituents in your area. Consider who can help you promote programs to their constituents, such as:
 - a. Community foundations
 - b. Nonprofit resource centers
 - c. Estate planning councils and other professional advisor associations
 - d. United Way
2. Work with Tina Drum to email messages announcing the broadcast and encouraging attendance of CPGR members and prospects from our database who are in your area
3. Consider the start times you want at your site; they don't have to be the same as Denver (i.e. have an earlier start time to make sure you have time for everyone to introduce themselves)
4. Consider offering lunch or other perks for those in attendance

B. Hosting-Day of Meeting:

1. Ensure AV (computer, LCD, screen and phone) are in place and operating, and room is set-up
2. Welcoming:
 - a. Have a sign in sheet to track who attended and who is new
 - b. Consider name tags
 - c. Provide CPGR brochure and any flyers for upcoming meetings
 - d. Hand out the power point presentation and any other handouts provided by the speaker
 - e. Welcome everyone to the meeting
 - f. Have everyone introduce themselves and tell what they do and maybe why they are interested in planned giving.
3. Act as facilitator to:
 - a. Obtain questions from attendees that you can then type into the site. These questions will be asked of the presenter at an appropriate time during the program.
 - b. Voice any concerns regarding audio (ability to hear, need to repeat the questions) or video such as technical issues to home site in Denver.
4. Follow up:
 - a. Thank everyone for attending and encourage attendance at future events
 - b. Consider having attendees remain after the program ends to discuss the information they just received, share questions or concerns with the group to obtain input
 - c. Email an evaluation form to all attendees and encourage them to fill it out.
 - d. Email Tina Drum a list of attendees with contact information so that they can be added to the database. Provide her with feedback – good and bad – from program