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Memorandum

To: CPGR Outreach Hosts
From: Gordon Smith
Date: 2/6/08
Subject: Outreach Host's Responsibilities

A. Marketing:

1. Promote the CPGR programs to your constituents in your area. Consider who can 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 encourage attendance to those on the CPGR 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. On the day of the 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, maybe on note cards, that you can then type into the site which will be asked of the presenter at an appropriate time.
 - 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.

- c. When the speaker asks the audience a question, repeat the question to your site and have them answer as a group (to promote interaction)
- 4. Follow up:
 - a. Thank everyone for attending and encourage attendance at future events
 - b. Consider having attendees remain for a bit 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 that they fill it out.
 - d. Email Tina Drum with information about program including:
 - i. List of attendees with contact information so that they can be added to the database
 - ii. Highlights – good and bad – from program