

Collective Insight Viewing Party: Planning Guide

Collective Insight: Driven by Shared Data is an OCLC series of events and programs that bring library staff and industry leaders together to engage in conversations around timely and relevant themes of importance to libraries today.

OCLC members around the world are invited to join in the conversation—and by hosting a viewing party, you can bring the conversation to you when it fits your schedule and meets your needs.

By making these special presentations available via recordings or webcasts, the content can be leveraged to stimulate conversation and inspire future solutions at the local level. Viewing parties provide an easy way to re-use this content for your local audience. OCLC provides hosting institutions or organizations with all of the tools to launch a successful event.

Viewing parties leverage the special programs created for the Collective Insight series and give you the opportunity to jump-start conversations at the local or regional level around important topics and themes that educate, inform or impact decision-making and planning for your audience.

This guide outlines the tools you will have access to, plus tips to help you plan your party and get the most out of the presentation topics. Please feel free to use any of these materials, or, if you have any questions or need more information, please contact us at partnerships@oclc.org.

What is a viewing party?

A viewing party can be anything you want it to be: a stand-alone event, part of a workshop or seminar, a catalyst for dialogue, a strategic planning device or professional development opportunities. Whatever your needs, the content from the presentations in the Collective Insight: Driven by Shared Data series is yours to use. And by hosting a viewing party, you will be part of the dialogue, sharing and learning with peers and colleagues across the US.

Viewing parties also give you the flexibility to schedule meetings at times convenient for you. The format of the party is flexible as well. You can host meetings in-person or virtually. Recordings can be viewed ahead of time, or shown at the event. They can be parsed, snipped or chunked to align with the flow of your discussions. You can stream live events and hold simultaneous discussions focused on the how the topic pertains to your specific audience. Viewing parties can also be “amped up” by bringing in a discussion facilitator, a local speaker, or even assembling a panel of local experts to react and respond to the presentations.

What's in the “box”?

You will find everything you need to make it easy for you to host a successful event; some general information: Evaluation, Planning Checklist and Planning Timeline; and specific information for the topic and event you selected: Registration, Communication, Discussion and Facilitation.

The Planning Checklist and Planning Timeline are included in this guide as appendices; this information is provided for your convenience, based on past experience from previous viewing parties hosted by Partners.

Registration

Once the topic is selected, you will receive a customized registration link for the event. OCLC will manage the registration and will update you weekly via e-mail with registration numbers so that you can plan appropriately for the number of guests at your event. We will also provide you with a final list of the registrants after the event.

Your customized, event-specific registration link will be available as part of the facilitator and discussion guide. These items will be sent to you via e-mail after your initial phone conversation with a member of our Partner Programs team.

Communication

To maximize your communication efforts, OCLC will provide a variety of communication templates for use at your convenience. You can customize these templates, giving you flexibility in how you promote the event to your audience. OCLC will provide these templates after your initial conversation with the Partner Programs team.

- ✓ An e-mail template to which you add information about your event and then send to your mailing list; this will include the event registration link
- ✓ Several customizable e-mail reminders, including a “last chance to register” invitation
- ✓ E-mail template for sharing event-specific information
- ✓ An agenda template; you decide whether to share the agenda in advance or on the day of the event
- ✓ A “thank you for registering/attending” e-mail template for use after your viewing party

If you identify additional communication needs, please contact partnerships@oclc.org and we will work together to help you create any additional resources you may need.

Discussion and Facilitation

To ensure an engaging event, OCLC has done much of the background work for you. We have put together a comprehensive facilitator’s guide and discussion suggestions that you may find helpful in planning and hosting your viewing party.

The facilitator’s guide provides a brief synopsis of the topic, as well as context of the event. To generate quality discussion and engagement with your attendees, OCLC has also created a series of discussion questions to use as part of your event. These are simply suggestions, but have proven effective as part of the live events.

These materials will be provided, along with the registration link and communication pieces for your event, after your initial conversation with a member of our Partner Programs team.

Evaluation

As part of this event, we would like to receive feedback from your guests and from you on how the event was received, how interesting the topic and discussion were, and what other ideas your guests have for future events, topics or speakers. To do this, you have two options:

Option 1: You may use the evaluation link provided here, which leads to a SurveyMonkey evaluation form that when completed, is submitted directly to OCLC. If you choose this option, OCLC will send you a copy of the evaluation results and report within two weeks of the event.

Option 2: If you wish to use your own evaluation instrument, we request that you add three specific questions about the event and the series so that we can gather feedback from your guests. The three questions are:

- 1. What did you find most valuable about the event content?**
- 2. What additional topic(s) would you like to see in future events?**
- 3. Would you attend a future viewing party? Why or why not?**

Host Checklist

Here is a checklist of things to consider when hosting your viewing party.

Pre-meeting:

- ✓ Decide on format for event: in-person hosting, virtual or combination
- ✓ Send invitations (OCLC invitation template optional)
- ✓ Set up registration form
- ✓ Promote event—use our template or create your own
- ✓ Update OCLC with the number of people attending the viewing party
- ✓ Invite any additional speakers or discussion facilitators
- ✓ Set agenda for meeting or modify sample agenda with your own topics
- ✓ Test WebEx compatibility prior to meeting
- ✓ Decide on evaluation instrument—in-house or OCLC's online evaluation tool
- ✓ Request OCLC collateral if desired
- ✓ Order catering if desired

During meeting:

- ✓ Introduce topic and review agenda
- ✓ Explore/discuss meeting and discussion outcomes for your group
- ✓ Decide on follow-up activities or next steps as part of the meeting outcomes
- ✓ Distribute meeting evaluations or use OCLC's online survey link following the meeting

Post-meeting:

- ✓ Record event if desired; provide link to participants
- ✓ Provide link of the OCLC webcast to participants and/or link to OCLC Collective Insight series page

- ✓ Send attendee list: names, e-mails, institutions to OCLC within 10 days of event
- ✓ Provide summary of evaluations to OCLC within 10 days of event, or, if using OCLC's online evaluation instrument, OCLC will send summary evaluations to host within 10 days of event
- ✓ Complete OCLC Host Evaluation online, within 10 business days
- ✓ Use meeting outcomes to promote or position related Partner activities, services, training to continue the conversation or support the topics discussed

Preparation and planning timeline

- ✓ **Months in advance**—OCLC will give general information on topic, date, proposed speakers
- ✓ **10–6 weeks in advance**—OCLC will provide Partners who are interested in hosting with a blurb for use in newsletters, websites, Facebook pages, Twitter accounts, etc., that gives a formal title, speakers, registration information—no external promotions to begin until after this date
- ✓ **10–6 weeks in advance**—Partners can begin looking for ways to localize training programs, upcoming conferences, popular local speakers on the topic and/or local programs on the topic
- ✓ **6–4 weeks in advance**—OCLC will begin nationwide promotions of the OCLC event
- ✓ **6–4 weeks in advance**—Partners can begin statewide or localized promotions of the OCLC event along with localized additions, including times and locations
- ✓ **6–4 weeks in advance**—OCLC will provide a template for registration to Partners; hosting Partners can use their own registration pages for members attending their viewing parties; Partners should register only once with OCLC regardless of how many people will attend their viewing parties
- ✓ **6–3 weeks in advance**—OCLC to gather hosting Partners' agendas to be mentioned/incorporated into OCLC program
- ✓ **3– 1 week in advance**—OCLC and hosting Partners will continue to advertise, share Tweets or like Facebook postings, etc.
- ✓ **3–1 week in advance**—OCLC will provide 3–5 discussion questions that will facilitate discussion; these questions will serve as a talking point, but Partners can come up with their own questions before/during the OCLC event and do not need to use the OCLC-provided questions
- ✓ **1 week in advance**—OCLC and hosting Partners will send a reminder e-mail to registrants
- ✓ **1 week in advance**—OCLC and hosting Partners will share registration numbers (e.g., OCLC has 20 libraries registered from the Partner state; the Partner has 25 people registered to come to its office)
- ✓ **1 week in advance**—Hosting Partners test log-in capabilities, phone/speaker capabilities and contact OCLC for troubleshooting any potential problems
- ✓ **Up to 1 week after**—OCLC will send out recording of the event, Partners can then forward to their members with “thank you” and any other follow-up material they may have highlighted
- ✓ **Up to 2 weeks after**—OCLC and hosting Partners will share results of evaluation of program