PDT2020 Technical Committee Guidebook

Welcome to the Professional Development Training (PDT) 2020 Virtual Technical Committee!

We have assembled this PDT2020 Guidebook to assist you in your role on the PDT Virtual Technical Committee. We appreciate your willingness to volunteer your time and expertise in helping AGA develop and deliver another high caliber, well attended training event.

This document provides:

- A PDT at a Glance – what, where, when, and who
- PDT Technical Committee Roles and Responsibilities
- Session Development
  - Moderator Responsibilities
  - Speaker Responsibilities
  - Five Ways to Engage Your Audience – Helpful Tips
  - Use of Technology
- AGA Staff Responsibilities
- PDT2020 Virtual Milestone Planning Schedule

This document including moderator confirmation form, speaker registration forms among other pertinent documents and deadlines are also available on the AGA PDT’s Speaker Corner webpage here -

Please check this webpage for most updated details.
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PDT 2020 VIRTUAL AT-A-GLANCE

PDT LEARNING OBJECTIVE: The PDT provides participants an opportunity to share and learn from each other about the latest developments in government financial management. Attendees will hear about challenges and successes in implementation of new technologies, how to leverage tools and techniques, and apply valuable (scarce) resources to fulfill their agency mission. Attendees will also be able to network and learn from experts from federal, state and local governments, academia and the private sector on various topics to plan and build stronger project(s) to ensure greater success and engage in cooperative implementation across all agency levels.

DATE: Monday, July 20 – Wednesday, July 22, 2020

LOCATION: Virtual

TRAINING STRUCTURE: AGA has partnered with Digitell, Inc. to host the virtual PDT. Attendees will be able to receive up to 21 hours of CPE and/or 20 PDUs

- Training will be held in Eastern Standard Time
- Attendees will join the training through their web browser without needing to download any software
- All attendees are in listen-only mode and cannot be unmuted (please see page 16 for attendee engagement technology)
- Only speakers can mute and unmute themselves – if speakers/moderators registered for the training, please see page 11, section D for speaker registration information
- Forty-eight total sessions
- Three concurrent sessions
- Virtual Solutions Hall
- Participant Challenge for prizes to engage and network virtually

We believe that registration this year will be strong! We also believe the sessions that you have contributed contain much needed information, highlights agency successes as well as challenges, and provides useful solutions that attendees can adapt to their own environments. Attendees can expect this PDT to bring a robust agenda with keynote speakers, interactive learning, a virtual Solutions Hall, and online networking events to connect with colleagues around the country!
PDT2020 VIRTUAL PLANNING SCHEDULE

The following schedule has been developed to accommodate new logistics for the virtual PDT. Please let Kia know if you have any questions.

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>May 10</td>
<td>Down-select sessions for agenda from the originally approved set of 90+ sessions. Only 48 sessions can be selected in the virtual agenda.</td>
</tr>
<tr>
<td>May 15</td>
<td>Letters to Technical Committee members announcing session status</td>
</tr>
<tr>
<td>May 29</td>
<td>Submit moderator names and any confirmed speakers</td>
</tr>
<tr>
<td>Month of June</td>
<td>Speaker/Moderator Training – What to Expect/How to Use Platform</td>
</tr>
<tr>
<td></td>
<td>- Exact dates TBD</td>
</tr>
<tr>
<td></td>
<td>- Will host two sessions that you can choose to join to learn what to expect and how to use the platform as a speaker/moderator</td>
</tr>
<tr>
<td></td>
<td>- Questions will be addressed during this training</td>
</tr>
<tr>
<td></td>
<td>- Kia will send invitation to all confirmed moderators and speakers</td>
</tr>
<tr>
<td>June 26, 2020</td>
<td>Speaker registration. PowerPoint presentation and biography due to Kia Lor.</td>
</tr>
<tr>
<td>July 6</td>
<td>All session materials/handouts to registrants</td>
</tr>
<tr>
<td>July 20 – 22</td>
<td>Show time!</td>
</tr>
</tbody>
</table>
1. PDT2020 VIRTUAL TECHNICAL COMMITTEE ROLES & RESPONSIBILITIES

CO-CHAIRS
During the PDT the three co-chairs will participate (as available) by introducing speakers, moderating panels and or participating on panels.

- **Federal Government:** Gerard Badorrek, CFO, General Services Administration
- **State/Local Government:** M. Elizabeth Reich, CGFM, CFO, City of Dallas
- **Private Sector:** Som Saadat, Vice President, CGI Federal

TECHNICAL COMMITTEE MEMBERS
Technical Committee members are volunteers representing all levels of government, the private sector and academia who are encouraged to submit session proposals information via the online portal.

If you are assigned to coordinate a specific session, it is your responsibility to finalize the topic, create a session title (5 words or less), write a description, invite speakers and prepare (or coordinate the preparation of) presentation materials and audience engagement questions.

Virtual Logistics Checklist - The following guidelines will assist you in coordinating your session(s) with your panel members:

a) **No traveling required!** – All moderators/speakers will conduct the virtual training from their own home/office.

b) **Zoom Platform (for speakers only)** – Our partner, Digitell, will use Zoom for video to bring each speaker into their web-based program to conduct the sessions. All panelists will receive an email invitation from support@digitellinc.com with a Zoom panelist access link. Please make sure that you can download Zoom to the device that you will use to conduct the session. If your work computer will not allow Zoom to be downloaded, please switch to your personal computer.

c) **Speaker Dry Runs – IMPORTANT!** We will host a training on how to use the platform in June (dates TBD); however, during your scheduled conference calls, please make sure to go over the checklist on page 14.

d) **Identify and invite government subject-matter experts.** Please be sure to select speakers who are engaging and from a mix of backgrounds - specifically gender, ethnicity, and career specialty. Be sure the caliber of speaker is appropriate for the session type.
e) **Number of Presenters:** Sessions are designated as either 50 or 75 minutes in length. Please keep this in mind when determining the number of panelists *and* allow enough time for Q&A. A guideline to use:

- For 50-minute sessions, up to three panelists
- For 75-minute sessions, up to four panelists.

f) **Educational Value & Program Diversity:** We encourage you to assemble speakers from a variety of organizations representing diverse points of view. Unless the session is targeted to a specific group or agency (such as the OMB Update), we suggest each session include a mix of presenters from different organizations and government levels (state, local and federal). **When in doubt, reach to Kia Lor at klor@agacgfm.org prior to inviting your speakers.**

g) **Please be sure that your invitation to your speaker(s) is clear.** Confirm via email the date and time each speaker has agreed to participate and the specific subject matter to be addressed. It is highly recommended that you summarize the topic for discussion – including what you expect the invited speaker to address before making initial contact with the speaker.

h) **Complete a Speaker/Session Contact Form for each presenter as soon as possible.** This will ensure we have the most up-to-date contact information for the speaker to use on promotional materials. Please make sure all information is accurate before returning this form to Kia Lor at klor@agacgfm.org.

- Upon receiving a completed Speaker/Session Contact Form, the AGA National Office will follow up with the presenter and send a confirmation email.
- AGA will correspond with speakers often to provide logistics and other important meeting details (e.g. power point presentation and bio.)
- Speakers will be instructed to contact you (the session coordinator) should they have any questions regarding session content. If you are coordinating a panel presentation, you may need to facilitate this process.

i) **NON-COMMERCIAL CONTENT POLICY**
The training sessions may not be used as a platform for commercial sales, self-promotion, or as a forum to criticize competitors. Presenters are expected to share information in an educational and non-commercial manner that is not specific to a product or service. Presenters are also cautioned to refrain from overt statements, harsh language, or pointed humor that disparages the rightful dignity and social equity of any individual or group.

**MODERATORS**
Technical Committee members may also be moderators/panel facilitators. A moderator is the liaison between the speaker(s) and AGA staff in managing all session materials, including speaker
confirmation, registration form, bio, and session PowerPoint materials. A moderator will introduce speakers and/or panel members, keep time, facilitate audience question/answer periods (Q&A), and kick off Q&A with his/her own questions or comments, and facilitate audience questions. (See Moderator Responsibilities.)
2. SESSION TITLES AND DESCRIPTION GUIDELINES

Session titles can help your session stand out in the program and attract attendees. Here are some guidelines and tips for developing session titles and descriptions. The session learning objectives will help to guide the development of the presentation content – specifically, what do you want the attendees to learn during the session?

A. Session Titles

Develop exciting, fun, and engaging session titles. Try to clearly identify what the session is about in five words or less.

Too long:
M100: Being Transparent – Using the Citizen-Centric Report to Inform the Public

Just right in length and a little fun.:
M100: What’s in Your CCR?

AGA will assign a session ID to each session (i.e. M102, T105, W110 etc.) once the program has been finalized, designating the day (Monday, Tuesday or Wednesday) of the session and number. When providing session titles in your communications, please include the session IDs.

B. Session Description Examples

Please use active voice for an effective and interesting description. Ideally, descriptions will total 50 words or three to five (3-5) sentences. For example:

Session Title: M100: What’s in Your CCR?

Session Description: The Citizen-Centric Report can be the mechanism in providing honest, direct, simple information. A snapshot of governmental financial and program performance, it is a four-page, visually appealing, plain-language summary report providing an array of valuable information. Learn how Citizen-Centric Reporting can help communicate financial and performance information to the public.

NOTE: The session title must be descriptive enough for AGA to assign a NASBA field of study.
C. Learning Objectives or “Key Takeaways”

Developing learning objectives for the session helps to keep the speakers on track during their presentations. Learning objectives might include identifying reference materials/resources, tips for success and best practices that can be applied by the audience members when they return to their offices. Lessons learned are also helpful such as hearing how a disaster was avoided, how to leverage a specific methodology or use a specific approach to save time and money.
3. MODERATOR RESPONSIBILITIES

As moderator, you will serve as the discussion facilitator. You will be responsible for introducing speakers, managing time and facilitating the audience question and answer portion of the presentation. In some cases, you may also have a small speaking role, providing an overview of the session content.

The following information will help you prepare for your virtual session.

<table>
<thead>
<tr>
<th>Access as a Panelist</th>
<th>Moderator Control Panel</th>
</tr>
</thead>
<tbody>
<tr>
<td>You will receive an email with a Zoom link to join as a speaker. Please click on link below to learn how to join the session.</td>
<td>As a moderator, you will be given the moderator control panel on your screen once you have signed in as a panelist. Please click on the link below to learn how to navigate the moderator control panel. Speakers will not see this control panel.</td>
</tr>
<tr>
<td>Please make sure to download Zoom on your device.</td>
<td></td>
</tr>
<tr>
<td><a href="https://vimeo.com/408905445/a04935d8f3">https://vimeo.com/408905445/a04935d8f3</a></td>
<td><a href="https://digitell.sharefile.com/share/view/s5897fa0c3f141dab">https://digitell.sharefile.com/share/view/s5897fa0c3f141dab</a></td>
</tr>
</tbody>
</table>

**Before the Event**

a) Coordinate with (each) speaker to produce session materials to send to AGA for the agenda. If necessary, contact the Technical Committee member and/or Kia Lor at [klor@agacgfm.org](mailto:klor@agacgfm.org) for advice.

b) Confirm that (each) speaker has provided bio and presentations to Kia Lor in a timely manner. *See 2020 PDT Milestone Planning Schedule.*

c) If the session is a panel presentation, determine the order of speakers.

d) If using presentation slides, use AGA’s PDT2020 slide deck template and font size recommendations - incorporate pictures and charts.

e) Please make sure to schedule a meeting with all speakers to discuss session flow. We will host a training on how to use the platform in June (dates TBD); however, during your own meetings and discussions, please make sure to go over the checklist on page 14.
f) **Run-of-Show** – Please complete the run-of-show once you have completed the meeting(s) with your panelists. It is important that the information is accurate as our technician will use it to run the session during the live event.

**On the Day of Your Session**

a) **Log in at least 30 minutes before the start of the presentation.** Everyone will automatically enter a virtual green room where our producer will welcome you and give you instructions.

b) **Begin the session on time:** Once it is time, the producer will signal everyone that it is time to begin at which time, you will automatically be transferred into the “live room”. All attendees will be muted except the presenters. Make sure they everyone is aware of time limits, including the question and answer period.

c) **Introduce each speaker:** Briefly introduce the speakers. Biographies provided by the speaker(s) are available on the PDT website and in the player screen. There is no need to repeat what the attendee can read. We also encourage you to work with your speaker(s) on how they would like to be introduced.

d) **Welcome the audience and give brief remarks about the topic from your point of view.** Please see script below:

> Welcome everyone! During this session, you can be part of the discussion by submitting your questions on the question box (on the left side of your screen). From here, you will be able to submit questions for the speakers or vote on a question that you would like to have addressed. You can also participate in polling (if applicable). Toward the end of this presentation, an “Evaluate this Session” button will appear.

e) Please do not monopolize the conversation. Do contribute your subject matter expertise throughout the session.

f) **Refrain from using acronyms and/or assume the audience is familiar with specific jargon/lingo.** Spell out acronyms on slide the first time used. Fully explain the topic you are presenting, why it’s important and remember, your audience may include individuals from all levels of government, academia, and the private sector and may be hearing about this topic for the first time.

g) **Manage your time – Don’t forget about Q&A.** Monitor the questions that come from the audience. Audience will stay engaged when their questions are addressed.
h) **End the session on time:** Allow a few moments to add your own brief closing remarks and key take-aways of the presentation (optional). **It is very important for speakers to stay within the allotted time limit.** Managing your time will help keep the entire program on schedule.

i) **Session Evaluation:** Before ending the session, please remind everyone to complete the evaluation. Fifteen minutes before your session ends, the “Evaluate this Session” blue button will appear on audience’s device screen. **Please note:** these evaluations are NOT used to verify for CPEs. CPEs are only tracked by random name badge scanning as attendees enter/exit a session room.

**IMPORTANT TO REMEMBER:** The training may not be used as a platform for commercial sales, self-promotion, or as a forum to criticize competitors. Presenters are expected to share information in an educational and non-commercial manner that is not specific to a product or service. Presenters also must refrain from overt statements, harsh language, or pointed humor that disparages the rightful dignity and social equity of any individual or group.

**REGISTRATION** – Each moderator must register as a regular attendee by registering online or via email/mail. Speaker rates are only available for speakers.
4. SPEAKER RESPONSIBILITIES & INFORMATION

Important!
All materials below are due on or before Friday, June 26, 2020, to Kia Lor at klor@agacgfm.org.

A. DRY RUN & SPEAKER CHECKLIST –
Please participate in a dry run with your moderator and fellow panelists. During the dry run, please follow the suggested checklist on page 14.

B. SPEAKER EXPERIENCE & WHAT TO EXPECT –
Please watch this 2 1/2 minute video on what to expect as a speaker and how to access the session - https://vimeo.com/408905445/a04935d8f3
- Our partner, Digitell, will use Zoom for video to bring you into the web browser platform to conduct the session.
- At two weeks out, you will receive a panelist email containing the Zoom link. Once you receive the link, please download Zoom to make sure that you are able to use the platform.
- Work laptop – if you are using your work laptop and cannot download Zoom, please switch to your personal laptop/computer. You may forward your email to your personal email and access the link from there.
- If you do not have a personal laptop/computer to use, we will have you dial in to the session using a landline.
- If you do not have a landline phone, we will resort to using your cell phone. This is not preferred due to types of cell services which may cause audio delays or glitches during the session.

C. PRIVATE SECTOR SPEAKERS – NEW!
In addition to moderating a session, former federal Senior Executive Service (SES) or senior executive equivalent positions in state/local governments with distinguished long-term government career experience may now be considered for speaking roles, subject to approval by AGA. Please send your speaker request to Jerome Bruce at jbruce@agacgfm.org. The session should incorporate government speakers with a mix of backgrounds of gender, ethnicity, and career specialty.

D. SPEAKER REGISTRATION
Registration is required and ensures AGA has correct contact information. Please complete the registration form and return it with payment method (if needed) to Kia on or before June 26, 2020.
Please note: Speaker rates are only available for speakers. Moderators must register online or via the speaker contact/registration form.

- If you are registering to attend the training other than for your own speaking session, you will automatically be transferred to a regular attendee
- If you are speaking in multiple sessions, you will need to use the Zoom link in the email sent to re-enter as a speaker and follow same logistics as prior session

E. BIOGRAPHIES
Speaker biographies will be posted on the website and provided to the moderators who will briefly introduce each speaker before the session begins. Bios should not be read word for word. Please keep bios be brief (40-100 words) and written in paragraphs (no bullets or resumes.) They should highlight information you, as speaker, want attendees to know about you. If you wish, you may provide a headshot in Width:120 and Height:150. The moderator may also provide a bio and headshot, if desired.

F. POWERPOINT PRESENTATIONS
We request that speakers use the provided 2020 PDT PowerPoint template to maintain uniformity for the audience. If any additional handout materials are needed during a session, speakers are asked to coordinate production with the session moderator.

- Polling Questions and Team Battle - If you want to use polling questions and/or team battle in the slides, please complete the spreadsheets accordingly and include them with your final PowerPoint presentation. (See Technology Use.)
- It is imperative that we receive your PowerPoint presentation and accompanying session materials, registration form and bio on or before June 26, 2020. It must be sent to Kia to allow time to coordinate all speakers’ materials and load them properly in advance. PowerPoint presentations and bios are also posted on AGA’s website for attendees to view and print (if desired) before the training.

NOTE: By submitting the information, you hereby agree to have it posted, unless you specify otherwise.

G. RUN-OF-SHOW SPREADSHEET
Please complete the run-of-show once you have completed the dry run. It is important that the information is accurate as our technician will use it run the session during the live event.

H. NON-COMMERCIAL CONTENT POLICY
The training session may not be used as a platform for commercial sales, self-promotion or as a forum to criticize competitors. Presenters are expected to share information in an educational and non-commercial manner that is not specific to a product or service. Presenters also must refrain from overt
statements, harsh language, or pointed humor that disparages the rightful dignity and social equity of any individual or group.

I. **DRESS CODE** – Business attire is appropriate for all speakers and moderators on webcams. Examples could be jackets and collared shirts for men (no ties required), corporate logos on shirt pockets, and for women – dress or blouse, sweater. All images below are appropriate whether you are movie stars or one of our “PDT Stars”!

![Images of people dressed in business attire]
5. SPEAKER CHECKLIST AND SESSION PREPARATION

Each session coordinator is responsible to schedule their own conference calls with the panelists using their own virtual platform. During the conference calls, please follow the suggestions below to make sure that we deliver a professional and valuable experience for our audience.

A. Webcam settings
   - The use of a webcam is required (let AGA know if you are unable to use a webcam).
   - Please dress professionally (see dress code on prior page).
   - Make sure the wall behind where you are sitting is free of clutter and personal pictures, etc. and that lighting is in front of you (providing light on your face).
   - Do not sit in front of a window and we do not recommend using virtual background options.
   - Turn off webcam when you are not presenting – so participants will focus on the speaker.
   - Raise webcam to eye level (screen should only show from shoulders up).
   - Look into the camera on your own device while speaking as if you were speaking to someone right in front of you. This helps to keep the audience engaged.

B. Audio Setting – If Zoom cannot be connected for any reason, we will have the speaker dial into the session using a landline phone (and as a last-last resort, a cell phone may be used).
   - Select a quiet environment, free of distracting background noises (e.g. phone ringing, dogs barking, etc.).
   - Silence cellphones, and turn off TV, speakers, etc.
   - Maintain a strong and confident voice while speaking so that participants can hear you clearly.
   - Click "mute" on your control panel or phone when you are not presenting.

C. Internet connection
   - Hardwired Ethernet connection is highly recommended.
   - Although WiFi is convenient, a hardwired connection will provide the most reliable internet speeds for sessions.

D. Login 30 minutes – Please inform everyone to log in at least 30 minutes before your session starts so you have time to complete the above! Be mindful of the time allocated for your part of the session so that other speakers will have time to speak, and all speakers will have time to address questions.
6. TECHNOLOGY USE DURING VIRTUAL PDT

During the training, we will be utilizing the following programs to engage the audience:

**Social Q&A**
- Open a web browser.
- Go to [https://pdt.cnf.io](https://pdt.cnf.io)
- Select your session from the list.
- Submitted questions will appear under the green “Social Q&A” bar.

**Polling:**
- Kia Lor will embed your polling questions (if you are using polling) into your slide deck for you.
- When you reach the polling question slide, the poll will automatically unlock, and the audience can start answering the question.
- After the poll, advance to the next slide to automatically lock the previous poll.

**Team Battle**
- Team Battle is a quiz-style game in which groups of attendees compete against each other to answer questions correctly and quickly. During the session, attendees join Team Battle just as they would to participate in polling and audience Q&A. Team Battle questions and scoreboard will be embedded in the PowerPoint presentation by AGA once the final PowerPoint presentation is received.

**Participant Challenge - Gamification**
- Friendly competition with the audience to earn badges and points for each achievement – chatting with other participants during sessions, posing questions for speakers, and more! Winners will receive prizes at the end of the training.

**Virtual Solutions Hall**
- Participants will be encouraged to visit exhibitors in the Virtual Solutions Hall to connect with industry leaders, download brochures, chat and more!
FIVE TIPS FOR ENGAGING YOUR AUDIENCE

One -- Get to Know Your Audience – AGA has a broad membership – federal, state, local and tribal government entities, members from academia, the private sector, and the non-profit community. If you wish, at the beginning of your session, you could ask a quick question using polling to gauge who your participants are in the room.

Two -- Use the Attendee Q&A and Polling resource to connect with the audience. Engage with the audience and include meaningful questions that help to ‘set up’ the next topic your speakers will address. If you opt out of this resource, that is fine. You can always ask the audience questions, and they can raise their hands to come to the microphone, which will be in the middle aisle of each session room.

Three -- Storytelling - Offer Practical Examples and Ideas to illustrate concepts and applications of a complex process, how a key problem was solved, or success achieved. Use real life examples from your professional experience to make a relevant point. According to our surveys, speakers who use real life examples to engage their audience create an environment more conducive to learning, leading to more key takeaways from the session.

Four -- Practice with Other Panelists. Set up a call-in advance of the session so everyone knows the order of speakers, and the key points each speaker will address. At the event, verify the order of speakers. The audience wants to hear what you are saying.

Five -- Entertain, Don’t Just Inform your audience. People will participate and get engaged when they see the speakers having a good time, enjoying talking about their topic and sharing ideas and tips for success with the audience. Share stories or real experiences. The audience will remember key points made in a story.

Make your audience's investment worthwhile and please leave time for Q&A during or towards the end of the session!
7. AGA KEY STAFF - ROLES AND RESPONSIBILITIES

AGA National Office staff will be able to provide support for a range of activities. The AGA staff members listed below will be your main points of contact throughout the planning of the agenda and support to other logistics needs.

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ann Ebberts, MS, PMP</td>
<td>CEO</td>
<td>Responsible for planning, organizing, directing, and implementing education sessions</td>
</tr>
<tr>
<td><a href="mailto:aebberts@agacgfm.org">aebberts@agacgfm.org</a></td>
<td></td>
<td>Controls and approves all changes to the training agenda</td>
</tr>
<tr>
<td>Susan Fritzlen</td>
<td>COO</td>
<td>Provides guidance on fields of study, session audience levels, and overall technical program content and coordination</td>
</tr>
<tr>
<td><a href="mailto:sfritzlen@agacgfm.org">sfritzlen@agacgfm.org</a></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jerome Bruce, MBA, CAE, CMM, CMP, CEM</td>
<td>Director of Meetings and Exposition</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:jbruce@agacgfm.org">jbruce@agacgfm.org</a></td>
<td></td>
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<tr>
<td>Kia Lor, PMP, CMP</td>
<td>Senior Manager, Meetings &amp; Programs</td>
<td>Provides guidance on fields of study</td>
</tr>
<tr>
<td><a href="mailto:klor@agacgfm.org">klor@agacgfm.org</a></td>
<td></td>
<td>Assists in planning, organizing, directing, and implementing education sessions</td>
</tr>
<tr>
<td>Phone: 703.684.6931 Ext: 322</td>
<td></td>
<td>Coordinates all speaker/moderator requests including technology usage and Audience Polling applications on smart devices. See Technology Use at PDT for more details</td>
</tr>
<tr>
<td>Monica Cordova-Luna, CMP</td>
<td>Meetings Manager</td>
<td>Manages registration, including speakers and moderators</td>
</tr>
<tr>
<td><a href="mailto:mcordova@agacgfm.org">mcordova@agacgfm.org</a></td>
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