DCC
Digital Curation Centre

Tips on running online meetings and events v1.0

Digital Curation Centre

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Introduction

The ability to conduct workshops, seminars and meetings online is becoming increasingly commonplace and in some cases is the only option available. However, there can be different rules and tools that can be used which can be daunting to any potential adopters. This guide aims to provide you with a quick overview of the key considerations and tools. It is not intended to be an exhaustive guide but will provide a basic level of understanding to help you get started. Much more could be added and we will actively seek community inputs. A new version is expected to be published in the coming months so please give us feedback on what you need. Good luck!

1.
Define what you want to achieve from the event

In order to get the most from your online event or meeting, and to select the appropriate platform, you first need to understand your objectives. Are you just presenting information or do you want to engage the audience in discussion and exercises. Simple presentations and Q&A are often best done on webinar platforms, especially if you expect 50+ attendees as these limit who can speak and share their screen. You can run polls with larger groups, but if you want to get in depth discussion, smaller groups and platforms like Zoom or GoToMeeting which allow everyone to share video and audio are best.

2.
Choose the most appropriate platform

Once you know what you want to achieve from the event, you can use this information to select an appropriate platform. 'Appropriate' has a number of dimensions, for example:

- What type of online event are you planning?
- Is the event just for people in your organisation or do you want anyone to be able to join?
- What systems do you have access to?
- What technical constraints will your participants face?
- What level of privacy and security do you require?

Consider the level of privacy and security needed for your teleconferencing and choose a system accordingly. Read through the privacy policy that accompanies the different systems and platform security reviews. Once you have selected your system, go through the privacy settings and make sure they are set to your needs. Many systems come with these settings pre-filled in, so make sure you review these.

We start by listing a number of different systems and the main features of each. We then look at specific issues to consider which platforms are good or bad choices given those issues. The comparison table gives an at-a-glance overview of the key functionality of each platform. We have focused on webinar and conferencing systems rather than learning platforms such as Blackboard, edX and Moodle, but these are also worth considering if teaching.

Platform options
- *Adobe Connect* - a platform aimed at digital training, webinars and web conferencing. Has all the standard videoconferencing options and a wide range of plugins to integrate with other apps. Comprehensive security, compliance and privacy controls.
- *BlueJeans* - a video conferencing and events platform with Dolby Voice technology for improved audio. Supports all the major features and events package scales up to 25,000 attendees.
- *Google Hangouts* - audio and video conferencing free for up to 10 people in a call. Requires a browser or app to join. Free access to the advanced Hangouts Meet video-conferencing capabilities allowing up to 250 participants per call, live streaming for up to 100,000 viewers and ability to record meetings and save in Google drive will be available at no additional cost to all customers until July 1, 2020 in light of the Coronavirus pandemic.
- *GoToMeeting* - an online conference platform which allows you to pass controls to any participant so they can share screen and present. All can enable audio and video themselves. Depending on package calls are limited to 26 participants. (Higher subscriptions levels allow larger meetings; this is also true of GoToWebinar.)

There is a panel listing participants which makes it easy to scroll through and see who is there at a glance. Meetings can be recorded. The GoToWebinar platform allows higher capacity (up to 100 on basic subscription) and is designed to handle webinar-style events. You need to invite participants as panellists in order for them to present and share the screen. Participants are muted by default but can raise hands to speak or add questions in chat.

- *Jitsi* - this is pretty much like zoom just open source and free. It doesn't have breakout rooms but does offer the option to add password protections to join a meeting and provides speaking stats.
- *Microsoft Teams* - this allows you to set up different channels for instant messaging, share files and host video conferences. Many universities may have access via institutional subscriptions. MS Teams is not primarily an online meeting system, and although its general functionality (chat, files etc.) is accessible via a browser on any platform, the meeting application is more restricted. MS Teams is also aimed at organisations. It is possible to bring in those outside through guest invitations or accounts, but their experience will not be the same.
- *Skype* - reasonable platform for group calls with audio, video and chat for all participants. Can also share screen and send files in the interface. It becomes flaky quickly with large groups, but does have the feature of dialing in landlines if you purchase Skype credit which can be useful for participants with locked down computers who can't use certain platforms. Skype for Business supports some interactions such as polling, but may cause compatibility issues as it is a separate programme from Skype. It has also now been superseded by Microsoft Teams.
- *Slack* - predominantly a chat platform, slack allows you to send private messages to individuals and create small group chats or public channels for discussion. It also has an inbuilt calling option.
- The good old fashioned *telephone* - sometimes it's easiest to just pick up the phone if it's a one-on-one call. Make sure everyone's phone numbers are up to date in internal / public directories and that office lines are diverted if everyone is working from home! There are a big range of teleconferencing systems available - most require a subscription but some can be used on-demand (but callers then have to pay premium rates.)
- *Webex* - an online video/audio conferencing platform occupying a similar space to Zoom and GoToMeeting offered by Cisco. It's much older than most other platforms which has both advantages and disadvantages. It requires an organisational subscription by the meeting host.

- *Wire* - offers secure end-to-end encrypted conference calls, screen sharing, group chats, file sharing and guest rooms for external attendees. Wire is specifically designed for users that require the highest levels of security and privacy.
- *Zoom* - a video conferencing platform where all participants can enable audio/video and share screen etc. Free licences are offered but are restricted to 40 minute calls. You can also generate landline numbers for people to dial in if they don't have web access. Files can be shared via plugins to dropbox, google drive, one drive and others. There is also an add-on chargeable feature to break out into separate rooms if you want to facilitate discussion style groups.
- *Mentimeter* - an online polling software which allows you to create interactive presentations and facilitate interactive sessions of workshops. These could include quizzes or opinion type questions and can be represented as bar charts, dot cluster diagrams, word clouds and other formats.
- *Sli.do* - an online Q&A and polling platform. Users can add their own questions and the full audience can vote on these which can help determine which are the most important topics to cover.

Technical constraints

Not everyone will have access to the same amount of bandwidth or to equally powerful hardware when joining your online event. Sometimes that will affect your choice of platform; on other occasions it should affect how you run the meeting.

Newer platforms, in general, are more demanding than older ones, and video is more demanding than audio. Multiple video channels make more demands of bandwidth and CPU than a single channel. Screen-sharing sits somewhere in between audio and video in terms of bandwidth demand. Our experience suggests that MS Teams is more demanding of your local machine (memory, CPU) and the network than any of the other platforms we have looked at. Unlike many other systems, though, it has an option for any participant to turn off unwanted incoming video as well as turning off your local camera. This option can be useful if one participant faces a bandwidth restriction. Zoom is the second-most demanding of the platforms we've looked at. Its network bandwidth requirement is considerably reduced by reducing the size of its window, or allowing to run in its minimal configuration. This isn't true of many other systems, which will send a full video feed to you whether or not you have a full-screen window.

Table 1. The various tools described in this guide showing their capabilities and cost. Please note that the last 2 options are exclusively for polling.

Platform	Audio	Video	Screenshare	File share	Chat	Webinar	Record	Polls	Landline call	Web access	Platform compatibility	Cost
Adobe Connect	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	Windows, Mac OS X, iOS and Android	Meetings - from $50 pm; Webinar - from $130 pm; Learning - from $370 pm
BlueJeans	✓	✓	✓		✓	✓	✓	✓	✓*	✓	*Landline calling only for US and Canada	Meetings - $12-18 pm; Events - $500 per event
Google Hangouts	✓	✓	✓	✓	✓	✓	✓			✓	Windows, Mac OS X, Linux, iOS and Android	Extended free package currently to July 2020; €5-23 per user pm
GoTo Meeting/ GoTo Webinar	✓	✓	✓		✓	✓	✓	✓	✓	✓	Windows, Mac OS X, Linux/ Ubuntu (Web App only), iOS and Android	GTM = $19-29 pm; GTW = $89-199 pm
Jitsi	✓	✓	✓		✓	✓	✓		✓	✓*	Windows, Linux, Mac OS X and Android; *Web Access with Chrome extension	Free - Open source; Webinar option requires streaming to youtube
MS Teams	✓	✓	✓	✓	✓	✓	✓	✓	✓		Windows, Mac OS X, iOS and Android	£4-10 per user pm
Skype / Skype for Business (now replaced by MS Teams)	✓	✓	✓	✓	✓				✓		Windows, Mac OS X, Linux, iOS and Android	Free, although Skype credit is needed to dial in landline / mobiles
Slack	✓	✓	✓	✓	✓					✓	Windows, Mac OS X, Linux, iOS and Android	Free for small teams; £5-10 pm
Telephone	✓						✓		✓		N/A	Varied
Webex	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	Windows, Mac OS X, iOS and Android	Free for personal use for up to 100 people; Team/business solutions from £11.25 pm and host
Wire	✓	✓	✓	✓	✓					✓	Mac OS, Windows, Cloud, SaaS, iOS and Android	€4-8 per user per month, other price plans available.
Zoom	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	Windows, Mac OS X, iOS and Android	Free up to 40 min calls; Zoom = €14-19 pm; Webinar = from €37 pm; Zoom rooms is €46 pm per room
Mentimeter							✓	✓		✓	Browser based	Free (limited functionality); Or US $10-25 pm
Sli.do							✓	✓		✓	Browser based	Free (3 polls per event); £119-599 per event; £500-£1500 annual

So, if you can run a meeting which works as voice-only consider doing that. Or agree that only the person speaking (and perhaps the chair) will have their video enabled. Some platforms allow the chair to control this; others don't.

What is each platform good for?

If you are running a webinar with 50+ people, you are best to use a platform such as Adobe Connect, GoToWebinar or Zoom webinars as these are designed for presentation to a large audience and have useful controls such as Q&A, hand rising and recording features.

If you are running training, the decision on whether to use a webinar platform or an online conferencing option will depend on the level of interactivity you want with the audience. For more than a simple chat-based Q&A, the latter is preferable. If you want to provide demos or tutorials, having the ability to show video, share screen and record are desirable.

If you are running some kind of discursive event or community forum, a platform like Zoom, Google Hangouts or GoToMeeting which allows participants to share video and audio works best. These vary in how well they handle scale and may limit the number of participants. Also consider related software for polling such as mentimeter and sli.do to increase interactivity.

For general meetings, you have the broadest range of options, including Skype, Slack, Microsoft Teams, Jitsi, Google Hangouts, Webex, Zoom and more. Your choice will come down to which offers the facilities you need for the range of participants (i.e. video, screenshare, fileshare, record, landline call in options etc) and which perform well for the number of attendees. Skype and Google Hangouts cope best with small groups (5-10 people) while GoToMeeting, Webex, and Zoom can handle larger numbers.

3.
Plan, plan and plan some more

Running online sessions needs a lot of effort and coordination in advance. Before you start planning the delivery, make sure you've thought through what it is that the meeting/session is trying to achieve (awareness raising, knowledge exchange, lecture plus Q&A, discussion, shared experience). Knowing this will help you to focus on finding the right tools to support your objectives. However, it may be the case that some activities simply can't be run effectively virtually. Here are some tips:

Webinars and workshops
Pre-event
- When scheduling online events that will have participants from many countries, be sure to make clear to participants the time and in which time zone the event will be held.
- Time zone converter can come in handy: https://www.timeanddate.com/worldclock/converter.html
- Test out the platform in advance with everyone who is playing a key role in speaking or facilitating the meeting. Ensure everyone's audio and video is properly configured, test using the chat or Q&A, decide together how you will run the session etc
- Define clear roles for session facilitator, tech support and Q&A. It's too much for one person to run all these things. Someone needs to monitor chat to see if anyone has audio issues and help troubleshoot these.
- Prepare and pre-load any presentation slides or ensure the speakers know how to pass controls between them if all presenting from local devices.
- Make sure to send clear and concise joining instructions to participants and encourage them to test the software prior to joining the session to identify any problems. Make sure they receive:
- A link to the platform meeting room
- Link to the agenda/notes for the call
- Ideally prepare a couple of slides with screen grabs on where to mute/unmute and troubleshoot audio settings as people often struggle to find these.
- For Q&A sessions following a presentation, it is a good idea to have 2-3 questions in the bag before opening it to others just in case there are none or there is a lag time.

During session
- Begin by explaining how the session will run and where you want people to add questions and flag up if they need to select an option such as 'to everyone' 'privately' when adding a comment etc. Not all platforms offer all functionality, and that's a factor to bear in mind. The chat in MS Teams, for instance, is always visible to all attendees.
- Ideally have one or two people to moderate questions. Many platforms handle these badly. On GoToMeeting there is a question panel which the facilitators can see but not the audience. If questions go into the chat box, the text jumps every time new chats are added so it is often easier to pull questions out and add them to a googledoc where you can cluster them in advance for better facilitation. This approach also means that you don't lose the questions when the session ends. If you have a shared agenda and note taking document, you can also ask attendees to ask questions there. This allows them to ask questions anonymously and "vote"

for questions by just adding +1 to questions the. You need multiple people working on this. You can't chair, watch chat and collate questions and notes alone. Ideally, you should have a moderator, speaker and note taker who will also monitor the questions.

- It's best if the facilitator and presenters can enable video, at least at the start of the meeting so people feel more at ease.
- Webinar participants tend to arrive early - about 5 minutes before the official start! Until you hit broadcast or start the webinar, they will usually be seeing a blank screen and can't hear you. Be sure to regularly post welcome messages in the chat though stating when the session will start along with links to any shared docs. You can share your screen with an introductory slide stating the key information, too.
- Try to engage the audience during the session by asking questions at the end of each talk, using online polls or opening up chat. Sometimes people are very quiet and it can take a long time for questions to be written out so have enough gap-filling banter to hand. As noted above, have a few questions ready to pose in case there is a gap. You can also consider collecting questions from participants ahead of the session via email or google doc so you have some to start with.
- Try to encourage a few people to ask questions orally so it's more of a discussion, not just chat which can be quite alienating. However, this can be difficult to moderate if you have more than 20 people so bear the size of the group in mind. Ask people to make clear in the chat or by raising their hand if they'd like to ask a question orally so that these can be done systematically by the moderator. Again, a note taker who is looking at the chat box is vital for this.
- Make use of online polling platforms such as Mentimeter to allow audience participation. These can keep the audience engaged and can be quite fun (quiz competition works particularly well). They can also collate results automatically and can be used for analysis afterwards.

Community events

- When hosting community events, try to use platforms that are robust enough to handle videos being on all the time. This makes the meeting more convivial and engaging
- Where people don't know each other, an icebreaker or set of intros at the start can help. The moderator should move through the list of attendees as participants will not know what order to proceed in. Alternatively just try and generate some ad hoc discussion amongst a few people while you're waiting for the call to start to set

everyone at ease. This usually helps to generate higher levels of participation later.

- For larger groups you could start a document pre-session to collect very short bios. Ideally these would include photos, Twitter handles, relevant skills / expertise and something individual that helps to break the ice and build rapport.
- It's generally best if people mute when not speaking but they often forget to unmute so watch videos for moving mouths! It's a good idea to share a screenshot pre-meeting showing where the mute button is - it can be hard to spot!
- If you are hosting a meeting with multiple participants, the hand raising feature in many platforms can be incredibly useful. This essentially gives the chair a queue which ensures everyone gets a chance to speak and nobody is allowed to dominate. Remind people to put their hand down afterwards! As with face to face meetings, it is important that the moderator keeps to time and ensures everyone has a chance to have their say.

General meetings

- Ensure you send round details of how to join the meeting and all relevant agenda and document links well in advance. This is best in a calendar invite so people aren't scrambling through email last minute.
- Use screen share when discussing documents but also post the links in the chat so people can open and scroll their own version of the file. Remember than people joining late won't see earlier chat links so you may need to resend the agenda 5 minutes in
- Remember - a meeting that was scheduled to run for an hour but is done in 15 minutes doesn't need to keep going for the full hour! If you get things done earlier than envisaged most people are very happy. Conversely, if the meeting looks likely to run over the time allocated, it is important to check with participants if they are ok to continue for a period of extra time. Make this period of extra time clear and have a cut off point.

4.
Many hands make light work

You have to put as much if not more into online meetings and events to make them work. People can feel self-conscious and be a lot more quiet so pay more attention to building rapport. Everyone should muck in to help whoever is running the session. If notes are in a google doc, add to them to help take minutes or share links in chat to answer each other's questions. The organiser will be glad of anything you do to lessen their load.

You get the most out when you put the most in.
Be a remote participant, not a remote attendee!

If you are organising the meeting, make sure you have an additional comms channel that is not the meeting channel where you can communicate with your helpers about any help needed.

5.
Follow up

It is just as important to follow up with participants after online events and meetings as it is for face to face meetings. Many webinar platforms allow you to redirect participants to a summary page or feedback form when the event finishes. Remember to send out a post-event email thanking people for taking part, outlining where relevant documents and outcomes are available and clearly outline next steps. Also consider asking for feedback as you would for face to face training/events.

Bear in mind that people often agree to things during the meeting without really knowing what they are agreeing to. Be sure you confirm any actions agreed - either to the group or individually as required. Be as specific as you can - e.g., as agreed,' X' should do 'Y' by such and such a date. If your follow-up email contains a list of actions, keep the text brief so the actions don't get lost! You might consider asking those tasked to carry out an action to confirm by email that they are aware and willing. If there are future meetings planned, include the date/time in the follow-up email and send a calendar invitation.

Final Remarks

It is really difficult to run online events well, especially when it is your first time using new technology. Things inevitably go wrong: there are audio issues, people drop-out at inconvenient points, everyone speaks at once, you get distracted by being on camera etc. Try not to be too hard on yourself. The more you use conferencing and webinar platforms, the more adept you will be at presenting and chairing meetings effectively. As with everything, it just takes time and practice. As an audience member, make an effort to be responsive. Confirm that the audio is working, prepare questions to ask, give thumbs up and thanks. This will be appreciated by your host. Technology has improved vastly in recent years and is making it far more feasible to work remotely and run virtual events. The potential benefits of this are huge, not least for sustainability and global connections. Let's embrace that future together.

Sources of further information

Below are a series of links to online guides, webinars and blog posts related to running online events and working remotely.

Running meetings and community calls
- Yo Yehudi's guidelines how to run regular community calls with Zoom: https://github.com/intermine/community-call-archives/blob/master/community-call-guide.md
- If the link to your community call on zoom is public, this Twitter thread by Alex Miller provides some tips to avoid bad actors compromising the quality of your call: https://twitter.com/alexlmiller/status/1240073789586714626?s=20
- Paul Cannon's advice on configuring Zoom: https://universityofglasgowlibrary.wordpress.com/2020/03/15/tips-for-using-zoom
- DRI blog post on choosing video conferencing software: https://www.dri.ie/blog-videoconferencing

Online training and teaching
- Webinar with tips how to run Software Carpentry workshops online https://www.youtube.com/watch?v=MzsJyOkxqv8 -
- Tips for Teaching and Learning Online by the Carpentries community: https://docs.google.com/document/d/1MdmrNn5g2oa2AA6EGYZhyDx-O_YOoH_HqNGsmP6LKIo/edit#heading=h.bns84753wwhw
- Greg Wilson's talk on "Teaching Online at Short Notice": https://docs.google.com/presentation/d/1rE5e2kSFNICNkBJ4iIlgd9eqACi62gxahknKLtw9Hzs/edit#slide=id.g55ddde1eae_0_2

Online conferences
- A white paper on "A nearly carbon neutral conference" by the UC Santa Barbara https://hiltner.english.ucsb.edu/index.php/ncnc-guide/
- A webinar by KnowInnovation on virtual scientific meetings: https://knowinnovation.com/2020/03/you-too-can-go-virtual/ - You might also be interested in the Twitter thread by Melissa Vaught on her lessons from attending the webinar: https://twitter.com/biochembelle/status/1239943199163953152
- The organisers of the "Librarians Building Momentum for Reproducibility Virtual Conference" are currently drafting a workbook on organising academic online conferences at https://docs.google.com/document/d/1EABkSzEdJk5cmMLETpSbXaeDXmFwcTz7SUXP_C3dN9k/edit#heading=h.gpdz81815lr8
- Organisers of SatuRday Neuchatel have written up a guide for turning their event into an online conference in less than 2 weeks: https://docs.google.com/document/d/1ZXmwVibQKtfCY_HiB49-OhQL-yKhUS9YD9yeMQZH88E/edit#

Working remotely
- Working from home - adjusting to the new normal by Lorna Campbell - https://lornamcampbell.org/higher-education/working-from-home-adjusting-to-the-new-normal/
- Tips on working from home by Lauren Brumfield - https://labrumfield.com/tips-on-working-from-home
- Five ways to well-being when working from home by Jenny Lawrence - https://wonkhe.com/blogs/five-ways-to-wellbeing-when-working-from-home
- Managing virtual teams - series of blog posts and podcasts by Martin Hawksey and Maren Deepwell - https://marendeepwell.com/?page_id=2070

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