CSCCE

A guide to using virtual events to facilitate community building: Event formats

Find an event "recipe" that works for you!

Lou Woodley, Katie Pratt, Rachael Ainsworth, Eva Amsen, Arne Bakker, Stefanie Butland, Stephanie O'Donnell, Naomi Penfold, Allen Pope, Tom Quigley, and Emmy Tsang

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**Please be aware that Zoom may have released further software updates and changes in functionality to those described in this guide.*

Acknowledgements and contributions

We're very grateful for the generosity and enthusiasm of the members of the CSCCE community of practice for scientific community managers. Many of our members are involved with organizing events for their communities, therefore collaboratively creating this guidebook to capture some of that expertise was a natural next step for us to help others in similar roles.

This is a first version of this guide and we welcome comments as well as stories about how you've used the formats described. We may create future versions of the guide based on feedback so please email info@cscce.org if you'd like to make a suggestion or other contribution.

CSCCE uses the CREDiT contributor roles taxonomy to show how the authors listed contributed to the creation of this guide:

LOU WOODLEY - Conceptualization, Supervision, Writing - Original draft preparation, Writing - Reviewing and Editing

KATIE PRATT - Supervision, Writing - Original draft preparation, Writing - Reviewing and Editing, Visualization

RACHAEL AINSWORTH - Writing - Original draft preparation, Writing - Reviewing and Editing

EVA AMSEN - Writing - Original draft preparation

ARNE BAKKER - Writing - Original draft preparation

STEFANIE BUTLAND - Writing - Original draft preparation, Writing - Reviewing and Editing

STEPHANIE O'DONNELL - Writing - Original draft preparation

NAOMI PENFOLD - Writing - Original draft preparation, Writing - Reviewing and Editing

ALLEN POPE - Writing - Original draft preparation

TOM QUIGLEY - Writing - Original draft preparation

EMMY TSANG - Writing - Original draft preparation, Writing - Reviewing and Editing

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Introduction

With the COVID-19 pandemic and concerns about climate change, as well as a desire to make meet ups more accessible and affordable, virtual events are becoming increasingly important. And yet while many of us may have participated in or even hosted a video call or webinar, we may not have benefited fully from the additional opportunities that online meetings afford. By intentionally choosing meeting formats and making good use of the features of online tools, the way we work together online can be much more engaging and collaborative than simply staring at others staring at their own screens!

We created this guide to help you as a community manager, meeting organizer or other convener to host successful meetings that your attendees *enjoy.* Our emphasis is on engaging and inclusive events where attendees will feel able and motivated to participate and connect with others. In hosting such an event, you'll be creating community - whether as a one-off shared experience or part of a wider collection of ongoing community programming.

The complete guide - which we are sharing in sections - will work from the planning stages where you identify the goals of your virtual meeting through to choosing your meeting format and making decisions about how to use different features to enhance the meeting experience. In this section of the guide we focus on event formats.

We've worked with members of the CSCCE community of practice to create this section of the guide – drawing from a deep well of experience that spans different types of scientific communities, different event formats – and many hours of hard-worn lessons learned. So, drink deep from their generously shared wisdom – and have fun planning to make your next virtual event the best one yet!

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A guide to using virtual events to facilitate community-building: event formats

In this section of the guidebook we'll walk you through a few different formats for different meeting needs - sharing checklists and tips for how to make the most of each. We think of this section as a cookbook of meeting recipes - so don't feel that you need to read it from cover to cover, but rather like any good cookbook, you can choose from several of the recipes and customize to your community members' tastes.

At the top of each of the recipes you can find a number of tags from the following list. These are intended to help you find a format appropriate for your audience size, how rigid a structure you need, and the broad goal of the event.

Audience size	Format flexibility	Type of activity
SMALL GROUPS	NOT STRUCTURED	NETWORKING
MEDIUM GROUPS	SEMI STRUCTURED	MOTIVATION
LARGE GROUPS	STRUCTURED	INTRODUCTIONS
ONE-TO-ONE		KNOWLEDGE TRANSFER
ONE-TO-FEW		PRODUCTIVITY
ONE-TO-MANY		TEAM BUILDING
		ACCOUNTABILITY
		TROUBLESHOOTING

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Networking and Socializing

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Virtual coffee chats

ONE-TO-ONE **NOT STRUCTURED** **NETWORKING** **TROUBLESHOOTING**

This section was authored by Lou Woodley, Director of the Center for Scientific Collaboration and Community Engagement (CSCCE).

Rationale

Virtual coffee chats can be a great way to build relationships and exchange ideas with community members, peers and others with overlapping interests that you'd like to connect with. I've typically scheduled them on a Friday afternoon in the 3 - 4pm slot when things tend to be winding down for the week.

Checklist

- ☐ Zoom or similar tool for meeting.
- ☐ A relationship dashboard to help you to keep track of who you spoke to when - and how you might have promised to follow up. I create my relationship dashboard in a simple Excel workbook – with the first sheet listing chronologically who I spoke to when. I use a second sheet in the workbook to list people that I might like to schedule coffee with in the future.
- ☐ Some people prefer to use a tool such as calendly to allow others to select a free time on your schedule for coffee. Personally, I've preferred to stick with Friday afternoons because it's typically been a good time of the week to not be distracted by other deadlines.

Before the event

- Identify someone who you'd like to get to know better. This could be someone that you met at a conference, someone whose work you admire on Twitter, or someone in your community that you haven't spoken to in a while.
- Reach out and invite them to have a virtual coffee with you.

During the event

- You might want to start by thanking the other person for agreeing to chat with you and explaining why you set up these chats e.g. "Thanks for agreeing to share a virtual coffee with me today. I've set these up as an agenda-free way to get to know people who are doing interesting things. Why don't we start by introducing ourselves?"
- Next exchange some basic intros - who you are, where you're located and what you do.
- If they indicate something in their introduction that you'd like to learn more about you might use this as a jumping off point for the conversation. Or perhaps you can insert the reason you were prompted to talk with them e.g. "I really enjoyed meeting you at X conference but we didn't get

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to finish the conversation we were having about Y so I thought it might be good to continue that conversation." or "I read the blog post/paper you wrote recently and really enjoyed X about it - could we start by exploring that some more?"

- Alternatively, if you don't have one specific reason for reaching out, you might just start the conversation by asking "What are you working on right now that you're excited about?"

Tips and tricks

- Don't overthink this! The goal is to explore ideas and interests not to go down an agenda. So turn off any notifications and simply be present and enjoy getting to know the other person.
- Remember that this isn't an interview - it's meant to be a conversation! So don't ask question after question of the person you're chatting with but rather allow space for them to respond with questions of their own. Alternatively, you might get half way through the call and decide to say "It's been great learning more about your projects - is there anything you might want to ask about what I'm working on?"

After the event

- Add some quick notes to your relationship dashboard about who you spoke with, what topics you discussed and any follow up items e.g. if you promised to share any links or make further introductions to others.
- Email to thank the other person for their time and to share anything that you might have promised to send them.
- Periodically (every few months) you might take the time that you would normally use for a coffee chat to review the relationship dashboard and determine if there is someone you'd like to schedule another virtual coffee with, perhaps to follow up about how a project went or discuss a possible collaboration that may have arisen.

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Ice breakers

SMALL GROUPS **STRUCTURED** **INTRODUCTIONS** **MOTIVATION**

This section was co-authored by Katie Pratt and Lou Woodley of the Center for Scientific Collaboration and Community Engagement (CSCCE).

Rationale

Ice breakers can be important for several reasons (see here and here for blog posts on how to break the ice well). If your attendees don't already know one another they can be an opportunity to make introductions and to feel included from the outset of the meeting. If they are already acquainted and are returning to a shared space, an icebreaker can provide an opportunity to reconnect and maybe even take the relationship a bit deeper by learning more about one another.

Checklist

- ☐ Prepared activity (ask a colleague to review it for any unconscious bias or excluding language).
- ☐ Zoom or similar tool for meeting with breakout rooms functionality turned on.
- ☐ Any additional apps or software you will use.

Before the event

Pick your ice breaker activity! Here are some suggestions for what to do:

QUICK QUIZZES

- You can use the polling feature on Zoom (or use a third party tool) to prepare one or a few easy ice breaker questions of relevance to the group.
- You might ask a hypothetical question such as: "If you could travel in time would you visit the past, future, or stay here in the present?" You might alternatively ask something related to the subject specialism of the attendees, perhaps in a humorous way.
- This is a quick ice breaker that could work in groups of all sizes.
- **Tips for debriefing:** Allow a few minutes of conversation about the results after the ice breaker. You might ask for volunteers to say hello and discuss their answer choices (try not to put people on the spot!) or to ask people with similar roles to raise their hands so that they can further connect with one another.

FINDING COMMONALITIES

- Split the group into breakout rooms of 4-5 people (you can use the random assignment function of Zoom to speed this process).

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- Ask each group to make a list of things they ALL have in common.
- After 15-20 minutes, bring everyone back to the main room and ask each group to report out.
- The team that has identified the most things that they share in common "wins".
- **Variation:** If you're doing this activity as part of a workshop, you might pre-determine who will be in each room based on common research interests, career stages or something else. The prompt could then be: "Can you identify why you might have been placed in this room with the others? What do you all share in common?"
- **Tips for debriefing:** Ask the group to reflect whether they had a strategy (sometimes people start by discussing things they can see such as books in the background) and whether they might use a different approach if they did the exercise again. You might also ask the participants whether they identified things that some of them had in common, but not the whole group.

INTRODUCTIONS

- Split the group into pairs (again, random assignment works well here) and give them 5 minutes to introduce themselves to each other – a couple of minutes per person plus time for a short chat / to ask questions.
- Then, combine each pair with another pair (so you have breakout rooms of 4 people) and ask them to introduce the person they just met to the rest of the group (10-15 minutes).
- This is a great exercise in active listening. Return to the main room and ask the groups to rate how they did.
- **Variation:** Depending on the comfort level of your participants, you can allow more time after each round of introductions for informal chat so that deeper connections can be made.
- **Variation 2:** Adjust the prompt to focus more on each person's career path "Can you tell the story of your career path to your partner in 2 mins or less?" or what the person's community is for "Can you describe the community that you manage – who and what it's for and how it came about in 2mins?"
- **Tips for debriefing:** Ask the main group to reflect on the exercise. Some people find it very easy to summarize a topic in a short amount of time. Others find this quite stressful and may struggle to be concise or to decide which information to emphasize. It may be appropriate to relate this back to other principles of community management such as content creation, new member onboarding, etc.

THREE CAREER HIGHLIGHTS

- Split your group into breakouts of 4-5 people and ask them to spend 5 minutes writing a list of three career highlights.
- It may be helpful to offer examples that are tailored to your community.
- Then, go around the group and ask each person to share out (10-15 minutes).
- Ask the groups to notice any themes or commonalities to share in a report out session with the whole call.

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FACT AND FICTION

- Split your group into breakouts of 4-5 people and ask them to spend 3 minutes writing a list of three things about themselves, two are fact, one is fiction.
- Then, each person takes a turn saying their list and the rest of the group has to guess which statement is fiction.
- **Tips for debriefing:** You might use the debrief to discuss what strategy each person used to choose their lie (sometimes it's easier to take a true statement and modify a small detail such as changing where something took place). You might also discuss the power dynamics of accusing someone of lying and how that felt for those who were trying to identify the fictional information.

During the event

- As moderator, set a timer as soon as you start any breakout activity.
- Broadcast reminders or time prompts into the breakout room to keep everyone on track.
- Facilitate report out sessions and ensure that every group has a chance to report out.

Tips and tricks

As an organizer be careful to choose ice breakers that:

- Don't assume technical knowledge of the platform / tools that you are using - or if they involve new tools you take time to explain them clearly.
- Don't privilege one set of attendees over another especially if that reinforces existing power structures that may be present e.g. setting up hierarchies of experts vs. non-experts on a topic.
- Don't force attendees to be extroverted or "in public."

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Virtual social hour

SMALL GROUPS **MEDIUM GROUPS** **SEMI STRUCTURED** **TEAM BUILDING** **INTRODUCTIONS**

This section was authored by Arne Bakker, Director of Meetings and Community for Science at the Chan Zuckerberg Initiative and a CEFP 2019 Fellow.

Rationale

Informal ways for large groups of people to engage virtually can be challenging, especially with regards to multiple people speaking at the same time on Zoom. This 'Switchboard Operator' model for happy hours allows small groups of people to form and hang out in a fun and engaging way, while still having the sense that a large group of people is hanging out together.

The premise is that Happy Hour starts with all attendees in one main Zoom room doing a first group exercise that does not require too much speaking (i.e. a round of Team Trivia using Zoom polls). At the start of Happy Hour, the attendees indicate which discussion topic they are interested in, and during Trivia, the Host creates the breakout rooms and assigns people based on their choices. After Trivia concludes (5-10 minutes), attendees engage in small group chats about certain topics for the remainder of the happy hour, with the Host acting as a 'switchboard operator' moving attendees to different rooms/topics as they choose.

Checklist

- ☐ Zoom or similar tool for meeting with breakout rooms functionality turned on.
- ☐ Host with Virtual Backgrounds that work.
- ☐ List of 5-10 breakout room discussion topics.
- ☐ Slide and virtual background image that explains the process (see below).
- ☐ Set up 4-5 premade trivia questions using polls in Zoom meeting.

Before the event

- Schedule the Zoom meeting.
- Create an image to use as virtual background (Sample Images that you can use and edit to your needs can be found here: Adobe InDesign Images: version 1 and version 2. Fonts used: MinionPro, Basic Gothic Pro, Trevor, Image design by Jeremy Sackett Graphics).

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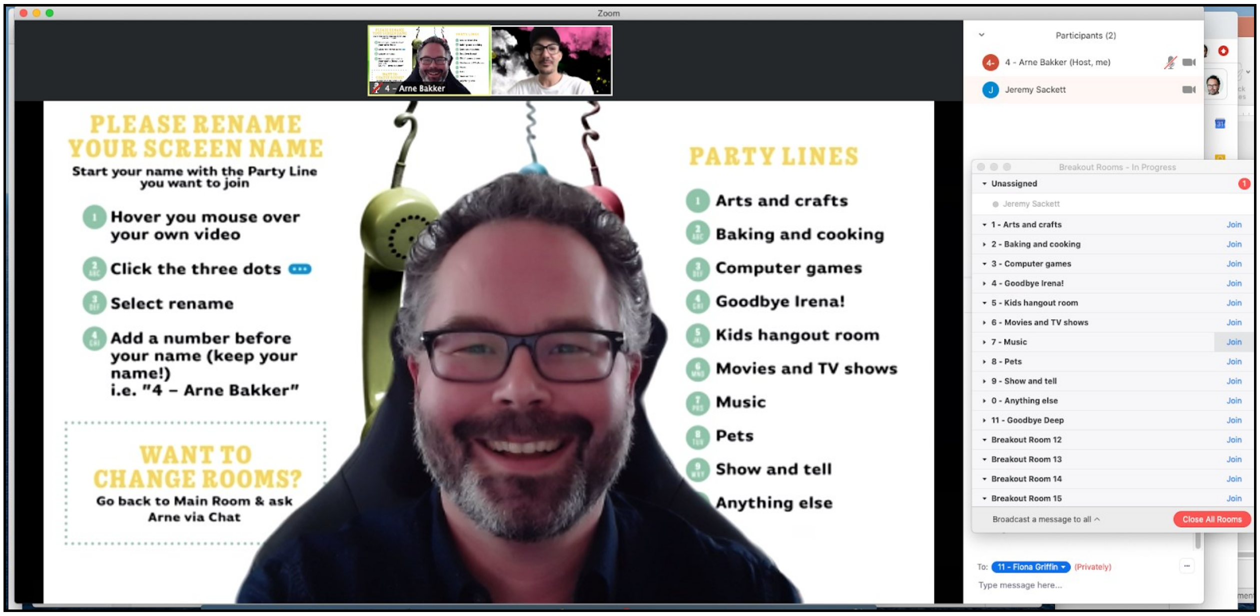

Figure 1
Virtual Happy Hour in action at the Chan Zuckerberg Initiative.
The image files provided (version 1 and version 2) are available under a CC-BY-NC 4.0 license.

- Decide on the breakout discussion topics: Use 5 topics for groups of up to 30 people and 10 topics for larger groups.
- Design 4-5 multiple choice trivia questions and code them into the poll function of Zoom
- Assign two to three people:
    - Master of Ceremonies (MC)
    - Switchboard Operator (SO)
    - Optional: Trivia Master (TM)
- Do a test run, making sure the SO understands how breakout rooms work. Note: the SO must be the host of the meeting in order to control the breakout rooms.

During the event

- Start meeting 10 minutes early with waiting room active.
- Host adds all organizers to the meeting and makes them co-host.
- Host makes sure the Virtual Background is working as intended.
- Host makes sure the Polls are working and ready to go.
- Host creates breakout rooms based on the pre-decided topics, ensuring that there are at least 3 extra rooms for 'emerging topics.'
- Host checks with all organizers they are ready to go.
- Host allows all attendees to join the meeting from the Waiting Room. Turn off waiting room setting for the whole meeting, so that future attendees will join automatically (depending on your preferred security settings).

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- Happy Hour starts! Roles of specific people are in **bold**. *Please note that MC and TM below can be the same person.*
- **Master of Ceremony (MC, co-host)** will kick things off in the main Zoom room (tone to be lighthearted and fun). Provide an overview of what will happen at the Happy Hour, such as: "*Get ready! We have a fun hour planned! There will be…*
    - *Team member trivia!*
    - *Breakouts! Fun topic areas for smaller groups to connect!*
    - *Your Switchboard Operator of today is [x]!"*
- **MC** hands off to **Switchboard Operator (SO, host)**
    - **SO** to explain the breakout rooms process:
        - Refer to the Virtual Background screen behind their face.
        - If many people are online, explain that they can 'pin' the SO's screen to make it larger so they can read the text.
        - Optional, have a slide ready via share screen with the same image to ensure it's legible.
        - Ask everyone to add a number by their name based on the topic they want to connect about later. Numbers of rooms are listed on the image/virtual background, as are instructions on how to change your name on Zoom.
        - Fun option: play Sade's 'Smooth Operator' music while the attendees change their name.
        - **SO** will refer to themselves as the Switchboard Operator throughout this in a fun manner.
- **SO** hands off to **Trivia Master (TM, co-host)**
    - **TM** to host team member trivia!
    - Whenever ready kick it off using polls on Zoom.
    - Use the Zoom Poll functionality to ask fun trivia questions (4-5 max).
    - Open the first Poll Question, read the question out loud (not the answer options), wait for 30-45 seconds so people can vote, close poll after 45 seconds or when >75% of people have voted, share results for 30 seconds revealing the answer, open the next Poll Question, etc.
    - *Please note that unless you have people register beforehand to the meeting, you won't know who voted for what, so it's more of a fun group exercise instead of being able to call out an individual winner.*
- During this Trivia, the **SO** will create breakout rooms and assign people based on the number they placed in front of their name. See the Zoom video on [Managing Breakout Rooms]() for instructions on how to do this.
- Once Trivia is done, the **TM** hands off to **SO**. They then:
    - Explain process once more for latecomers.
    - Call out those individual attendees who do not have a number beside their name yet.

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    - Explain that attendees can click “leave breakout room” at the bottom left screen in red when they want to move to a different discussion topic.
    - Once returned to the main room, tell the SO where you want to go next.
    - SO will assign a new breakout room to this attendee. *Please note that you will find their name in the old breakout room they just came from.*
    - Once assigned to the new room. SO tells the attendee they will need to click the breakout rooms symbol on the bottom of their screen to join. *Please note that Zoom WILL NOT automatically move them to a room like it did at the start of the breakout rooms*.
- Have fun!

Tips and tricks

- Have fun! Embrace the role as a switchboard operator using terms like ‘how can I help you today?’ ‘which room can I move you to?’ etc.
- Have someone else stay with you. If all goes well, you will be the only one left in the main room.
- Encourage people to switch rooms if that fits your community.
- To reassign people to a new breakout room, you have to find their name in the room they just came from. The numbers before their name will help. But you can also just ask which room they were just in for easier finding.
- Make sure to tell people to click ‘Join Breakout Rooms’ at the bottom of their screen when they are reassigned to another room. They won’t be moved automatically.

BREAKOUT ROOM SAMPLE TOPICS

- Arts and craft
- Bad fashion choices
- Baking and cooking
- Board games
- Books
- Cocktails
- Computer games
- Favorite karaoke songs
- Games
- Kids hangout room
- Meditation room
- Movies and TV shows
- Music
- Pets
- Quarantine haircuts
- Show and tell

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TRIVIA IDEAS

- Share baby photos of community members and let attendees guess who it is in the photo.
- Let participants guess who in the community certain fun facts belong to.
- Do a scavenger hunt where participants have 5 minutes to collect a list of 30 items from their home. Person with most items wins.

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Information Exchange

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Demos

MEDIUM GROUPS **LARGE GROUPS** **ONE-TO-FEW** **ONE-TO-MANY** **STRUCTURED**

This section was authored by Lou Woodley, Director of the Center for Scientific Collaboration and Community Engagement (CSCCE).

For example: virtual vendor showcases, hackday demos, sprint report outs.

Rationale

Often, in-person conferences will have a dedicated area for sponsors to showcase their products, which may include demos and the opportunity to pick up brochures and other promotional materials. Sometimes, a “vendor showcase” may be included in the event programming where attendees can show up at defined times to watch demos and presentations, compare offerings and ask questions of the vendors.

A similar use case is the wrap-up session that takes place towards the end of each day of a hackathon or working sprint, where teams that have been building a tool together or co-authoring a book chapter have the opportunity to share their progress with the other teams present.

Both of these formats can be replicated online - with some minor changes that allow for a deeper level of engagement with the tools and materials being shared.

Checklist

- ☐ Zoom or similar tool for meeting.
- ☐ Instructions for demonstrators.
- ☐ Sign up method for participants e.g. Google form ahead of time (or section to choose preferences on the conference sign up form).
- ☐ Volunteers to record the sessions in the breakout rooms (if required).

Before the event

- Decide whether demos are intended to be presentations to everyone or a selection from which attendees can choose, i.e., will you be using breakout rooms or only the main meeting room?
- Determine the number of demos – and if you are using breakout rooms, decide whether they cluster into rooms of related tools or topics – or whether you would like one demo per room.
- Determine how attendees will select the room that they wish to attend, e.g., will they select their preferred demos as part of the registration process or during the event itself?
- Create and share instructions for demonstrators about how the demos will work – including any requirements for logos/branding/sharing of materials. Will demonstrators be giving presentations? If so, do you have a template deck that you need them to use? Is there a time

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limit and presentation format they should follow (e.g., describe the problem statement, approach taken, outputs created)? If you're gathering materials for resharing afterwards, how and when should they submit materials?

- Decide whether there needs to be an all-group discussion in the main meeting room after the demos, e.g., to summarize the outputs from each themed room if using breakouts, or to allow for more general questions if using only the main meeting room.
- Create breakout rooms and decide how you are going to label them.

Tips for demonstrators

- Create a virtual background with vendor logo / branding – be sure to determine what will be visible once the presenter is in front of the background.
- Determine what electronic materials you may want to disseminate e.g. website URL, PDF copy of a brochure, link to a survey, link to a newsletter sign up page, etc.
- Determine how you will disseminate electronic materials. Will a co-facilitator add links to the chat at relevant times during the presentation? Will you add links to your slides?
- Do you want participants to engage with the demo or presentation in some way (e.g., submit answers via a poll, give feedback as they watch in the chat, ask questions at the end)? Who will facilitate this?

During the event

- Determine who will be responsible for assigning attendees to rooms.
- If you are planning to allow participants to rotate around several different rooms, how will you manage the rotations? Will these be timed, or can participants return to the main room and request you to assign them to another room?
- If you wish to record the demos taking place in different rooms, you'll need to assign a person in each room to do so because you cannot record breakouts as the meeting host who remains in the main room.
- If there is a shared activity that participants will be returning to after the demos, determine at what time the breakout rooms will be closed and message the breakout rooms to give a five-minute warning before this deadline.

After the event

- Follow up with demonstrators to thank them for taking part. Share any information with them such as metrics about attendance or email addresses of people who signed up for demos (if you have obtained this permission from attendees).

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Community calls

SMALL GROUPS **MEDIUM GROUPS** **SEMI STRUCTURED** **KNOWLEDGE TRANSFER** **MOTIVATION**

This section was jointly authored by Stefanie Butland, Community Manager for rOpenSci and Stephanie O'Donnell, Community Manager for WildLabs.net, who were both CEFP 2017 Fellows. Both rOpenSci and WildLabs.net host monthly community calls.

Rationale

A community call is a great opportunity to bring community members together for active discussion or participation. There is big value in participants seeing who's there (recognizing names from other online channels of the community), recognizing people from their research domain, and having the chance to build social capital.

Community calls often attract people already in your community, but may also interest people outside your community who join the call strictly to learn about a given topic or hear from a specific speaker. Therefore, community calls can be an opportunity for community growth.

In a community call, your goal is to encourage and facilitate participant engagement, either through open discussion (if it's a smaller group, say less than 30), in breakout rooms, or via group chat/virtual notetaking documents. Thus, a community call is different from a webinar. A webinar is a one-way transfer of information by a perceived expert in the topic. A community call, on the other hand, brings an opportunity to have presentations from one or more experts, but also to bring in niche perspectives and identify unmet needs on the topic. The role of the community manager is to put all the pieces in place and facilitate the call in a way that makes people feel their participation is encouraged. A typical community call might be a one-hour event that includes one to four presenters followed by a moderated Q&A, however this is community dependent and you may discover that you need to extend the length of your community calls to 90 minutes or even two hours. It's critical that the Q&A time (e.g. 20 minutes out of a 60-minute call) is strictly protected. A community call could also take the form of a panel discussion, if panelists have the opportunity to meet beforehand and you are prepared to moderate the Q&A.

When inviting presenters to speak on your community call, you may need to explain the benefit to them of doing so. These include:

- They don't have to give a long presentation, and could instead share a 2-min "use case" after a main presentation.
- It can help a person build social capital within the community and in their research domain (this is also true for all participants as they contribute thoughtful questions or comments).

Community calls also are a chance to invite "not the usual suspects" to present, which is a great opportunity for you as a community manager to elevate newer members of your community or

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maximize the impact of working group outputs.

There are a number of ways to implicitly encourage participation. Participants might be reluctant to speak up to ask a question. Encourage them to write questions in the chat or the collaborative notes document (a more permanent record for any follow up you may need to do), with their name, and the facilitator can actively call on them to ask questions during Q&A. You should also be cognizant that some people are more reticent to speak up, so you might consider inviting those people by name to contribute early on in the discussion.

One of the most exciting, and perhaps terrifying, aspects of a community call is that you, as the call facilitator, don't know entirely what will happen. But, by leaving space for your community to direct the conversation you are making space for new connections and for your members to go deeper on topics that are meaningful to them.

Checklist

- ☐ Make sure you have two people running the call. Have a facilitator/moderator and have a troubleshooter. Don't have one person trying to do both. The facilitator does not have to be a domain expert to be successful, however good facilitators bring a particular set of skills to the table.
- ☐ Use Zoom if you can. Other platforms are fine if you have smaller calls, but if you want to have an interactive call with more than 10 participants, Zoom is critical.
- ☐ Determine a need for the call - what does your community want to discuss? Do you need to invite speakers to help the community go deeper on a topic?

Before the event

- Identify potential topic(s) - You might consider a season, theme, or series of 3 or 4 events, as this allows us to create a story arc to the season and gives us a stop point that allows us to pause and take stock every few months (and gives us break!). Or, this might be a regular (e.g., monthly) event that community members can rely on happening.
- Sense check this with your community - for example, put a call out as a discussion thread or a tweet to check people are interested, whatever makes most sense for your community. This also helps build interest, and provides an open forum for people to suggest speakers.
- Invite speaker(s). If you have multiple speakers, connect them to each other before event so they can coordinate content.
    - If possible, arrange a pre-event meeting for all speakers (appears to be a big ask, but much appreciated and no one has said no to this). During pre-event meeting, people talk through what they plan to present, test their screen-sharing etc. This can be offered as an optional extra, however it may help also calm any pre-event nerves you may have.
- Ask speakers for permission to record and share so that they plan content accordingly.
- Publish abstract(s) - create a series page and associated event pages.

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- Make sure your participants know it's going to be interactive - remind them it's not a webinar and to make sure they have a microphone available so they can join in the discussion.
- Send out an invitation through Zoom - registration gives you an idea of attendance, whether your current Zoom license is sufficient (more information about Zoom licensing here) and it means you can ask additional questions (instructions here) :
    - Why are you interested in this topic?
    - What is one question you hope to have answered?

  The answers to these questions will help give your open discussion structure and give you confidence (and something to fall back on) as the facilitator.
- On the other hand, not requiring registration can lower the barrier to participation. You should gauge what will work best for your community.
- Minimize technical difficulties with logistics email to speakers (Zoom practice links, get backup version of their slides, join 10 minutes early, etc.).
- Get your Zoom settings in order.
- Step-by-step Instructions: https://docs.google.com/document/d/1KjY7pmJm8w-E6Xecgc1NQt_Miom_xg-8yylzJIAuvQk/edit?usp=sharing

DAY BEFORE EVENT

- Review registration question responses.
- You'll find that your participants are going to have similar questions - they usually coalesce into a couple of different buckets. This is super reassuring and tells you the main areas your discussion should hit. It also gives you something to fall back on if your community is quiet - a bank of questions to ask your speakers or your community.
- Create a run sheet with specific timings so that you are prepared to keep the call on track, e.g., https://drive.google.com/open?id=1F86EFRnM-i1VGDmUW_EJAPQP-QfLKJvw.
- Share your run sheet and commonly asked questions from registration with the speakers so they can adapt their talks to respond to specific questions (if they want) and be aware of what the discussion will likely cover.
- If you have a community platform or virtual note-taking document, post key questions (collated into the runsheet) before the call so everyone knows what will be covered. This also provides a place they can go after to continue the discussion from the call, e.g., https://www.wildlabs.net/community/thread/855.

During the event

Have two roles and split them between two people:

1. Operations (troubleshooting)
2. Facilitator (moderator)

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OPERATIONS:

- Assign co-host privileges - this allows your co-facilitator to access many of the Zoom functions you have as host (although not all).
- Start recording early.
- Have a list of possibly relevant links ready to go so you can drop them in the chat.
- First 10 mins handling participant's issues - mostly just telling people to log out and back in, or resending their registration links so they can get in. Make sure people know who to contact for help.
- If something goes wrong, this person can work with the speaker to sort it out while the facilitator carries on.
- Have facilitator and operations/ talking behind the scenes (e.g. Skype chat to flag questions, issues, ask for links, etc.).

FACILITATION:

- Minimize distractions - respect that you're going to be handing a lot of information. Be in a room alone by yourself, you don't even have your operations person in the same room with you. Have another channel open with your operations person (we have a skype chat open so we can be prompting each other to post links or if facilitator misses something operations person can say - hey the speaker didn't properly answer that, press them).
- It's okay to be nervous!
- Pop in 5 minutes early to say hello and direct people into the chat (makes people feel welcome and confident that there is a plan).
    - 15mins before the call starts, screen share an image that shows the name of the event, the agenda (speaker names, length of presentation), a bit.ly link to the collaborative notes doc, and a link to list of past community calls (or whatever information serves your community).
- Start with housekeeping – tell people how you want them to engage (i.e. chat) - an example template for this it here: https://drive.google.com/open?id=198JMVwXPrGkOtDER7pz3BXGVvzvtT2oIJDKItQObJbI
    - introduce yourself AND your organization (don't assume that people know you or it), note the code of conduct.
- Recruit champions, especially for your first session – who can demonstrate behaviors (i.e. do you want people to use the chat to say hello? Ask questions? Google doc to take notes? Having someone enthusiastically leading the way is so helpful, and you don't have to leave it to chance).
- During presentations (if you have speaker before the community discussion):
    - Have everyone turn their video off unless they are engaging (for big groups - do the opposite for small groups).
    - Keep presentations short, allow time after each for questions (lean on the runsheet).
    - As the facilitator, you'll be half watching the talk, but mostly keeping an eye on what's happening in the chat or in the QA section of the virtual note-taking doc – PM people to check if they have microphones before inviting them to ask their question.

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- Facilitator's job is to actively call on people to join in the conversation. Be patient, silence is okay – it is more important to give people time to sort their mic and have their voice heard than to fill gaps.
- If time allows, give space for some back and forth between the speaker and questioner from audience, but if it gets too technical or off topic or it's time to move things along, redirect questions into chat - e.g., "I will let <speaker> pick these questions up in the chat while the next speaker is presenting."
- If questions are more relevant to all speakers - acknowledge them and let people know we will pick them up in the panel discussion.
- If there are too many questions, acknowledge them and direct the speaker into the chat or virtual note-taking doc. (Note: the virtual note-taking doc is a more permanent record of conversations. While you can access the chat after the call, you will then need to add it to the doc if there is pertinent information to be archived.)
- Have this view (Figure 2) - don't let Zoom take you into full screen even when the presenter moves their presentation to full screen. You need to be able to see the chat and all the attendees.

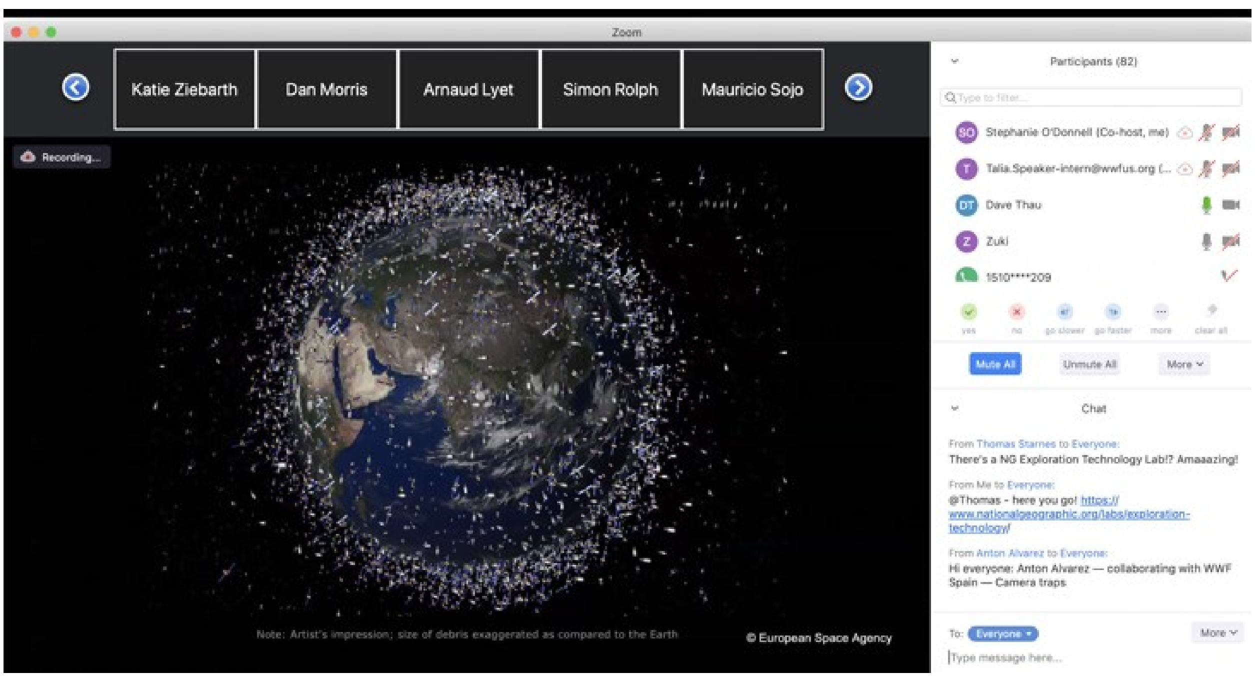

Figure 2
Speaker view in Zoom

- During open Discussion:
  - Allow plenty of time for discussion, as much as twice as much as we devoted to presentations.
  - Don't be scared of this time - the run sheet and your list of questions from registration gives you something to fall back on.
  - Schedule for the amount of time you need - people will give you an hour and half if you're engaging.

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- Have all speakers turn their video on and invite participants to turn videos on when they ask questions (this is for 30 + groups. If you have less than that ask everyone to put their video on).
- As the facilitator, if you have multiple speakers and you want to go into an open or panel discussion, make sure you actively transition from Q&A with final speaker to full discussion - e.g., “I’m going to invite everyone into this discussion now.”
- Be quite prescriptive about directing questions to a speaker.
- Balance between following the run sheet and allowing audience questions.
- Have a set of questions for speakers that you want to conclude with (reassuring for facilitator, makes speakers feel heard). E.g., “do you have any last comments?”

Tips and tricks

- If you have a group of more than 20-30 the facilitation is going to change. It's going to be heavily controlled/directed discussion with people joining in over microphones by invitation and most interaction happening via text among participants (either in the chat or in a collaborative notes document).

After the event

- Give people a place to follow up / continue the conversation.
- Right after the call, consider doing a quick “Red-Yellow-Green” debrief in a google doc for the organizing team to process what went right, what needs following up on, and what to avoid in the future. This process is really nice to share success and give everyone pats on the back. It also helps you unwind from the adrenaline of running the call.
- Share the call recording and takeaways with your community.
- Send thank you notes to speakers + link to recordings.
- Go through and contact people individually to follow up on specific items. Facilitate connections if needed.
- In terms of Zoom metrics, look at the attendance report, engagement stats, recording views, etc., and decide if these metrics can be used to define what success looks like in your community.
- Collect and archive notes of thanks or other feedback from members of the community to help with reporting and planning for your next call.

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Plenary lectures

LARGE GROUPS **ONE-TO-MANY** **STRUCTURED** **KNOWLEDGE TRANSFER**

This section was authored by Allen Pope, Executive Secretary for the International Arctic Science Committee and CEFP 2017 Fellow.

Rationale

Plenary lectures are meant to bring together the whole breadth of your community under a single focus. They are usually most successful when highlighting a particular speaker (or team of speakers) - for example, honoring an awardee of some kind, rolling out a new community-relevant study, report or project, or introducing new important partners or community leaders.

Plenaries should be broad and compelling rather than specific and technical. However, that doesn't mean that plenaries should necessarily be a one-way flow of information (if that were the case, you could simply pre-record the content and post it). The plenary lecture format provides a way for the main speaker to set out a lot of information to bring the audience onto the same page, and then provide opportunities for asking questions after that. This low-level engagement builds on initial passive participation (i.e., attendance/viewing) and can be a great way to encourage new, shy, or busy community members to engage.

Checklist

- ☐ Zoom or similar tool for meeting, but make sure you have a large enough license (or choose to do it through some other streaming service).
- ☐ Session moderator to facilitate discussion, Q&A, etc.
- ☐ Technical moderator (likely you!).
- ☐ Speaker bio, Twitter handle, and other relevant information to share.

Before the event

- Confirm your topic, speaker, and scheduling.
    - You might source topics and speakers from community suggestions, or your speaker and topic might be mandated, for example, by an award committee.
- Publicize the event widely.
    - Use a catchy and informative title.
    - Clear, concise descriptive language.
    - Link to more information.
    - Use visuals!
- Decide whether to require registration or not.

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- If people will be able to join via phone (e.g., as an accessibility measure for low-bandwidth areas), make sure to share materials such as slides in small, easily downloadable files beforehand.
- Have a test-run of the system with your plenary speaker and moderators. Replicate the exact setup and everything as closely as possible.
- Decide if your event will be live-only or if it will be recorded. Make sure that your speakers know any plans to record / archive the plenary.

During the event

- Invite the speaker and moderator to join at least 10 minutes early.
- Have the session moderator introduce the speaker, make sure that everybody is familiar with the technology (e.g., what are expectation of using the Chat box, the Q&A box, a plenary hashtag, etc.) and then hand it over to them.
    - **Chat box:** usually best for sharing links / extension materials, as well as being a way to help solve any technical issues the attendees might be having.
    - **Q&A box:** this is where questions for the plenary speaker should be asked (and answered).
    - Encourage a particular hashtag, so that attendees can be (for example) tweeting about the event and the content that is being shared. Be sure to share any relevant handles (e.g., the organization, the speaker, etc.).
- The session moderator is responsible for managing the questions / comments and passing them along to the speaker.
- The technical moderator is there to troubleshoot issues with the system and that any recording is working. They should also be empowered to answer any very simple questions in the chat using a text reply, as well as remove any inappropriate / off-topic questions.

Tips and tricks

- Zoom (and others) can allow you to stream directly to YouTube (although, you need an authorized account which can take at least 24 hours to set up). Streaming to YouTube means a recording of your lecture will be immediately available. You can also share the live-stream link (rather than / in addition to) your Zoom meeting as a security measure against Zoom-bombing (an incident where a bad actor joins your Zoom meeting and disrupts proceedings in some way). Make sure to be clear on how YouTube attendees would be able to engage e.g., emailing questions, tweeting questions, or using the built-in comments section in YouTube.
- Make sure that your speaker knows how to connect to Zoom over the phone, in case it needs to be used as a backup. If they have slides or screenshare materials, ask them to share those files with you in advance, in case you need to change whose screen is being shared.
- Strong communicators will often crave some back and forth with their audience. Using pre-planned polls can be a great way to have some simple interactions and enable your plenary speaker to learn more about their audience.

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- To increase the engagement of your participants, as well as extend the reach of your plenary lecture, make sure to augment it with social media. In addition to an official hashtag, publicize the event on your social media channels, make sure to amplify others who are doing so, and encourage further discussion and sharing via those channels by engaging with those who are doing so there (e.g. re-tweeting, responding, etc.).
- Within Zoom webinars, there are different settings about when questions and answers are visible to attendees - make sure to understand these and decide which settings are most appropriate for your community. The moderator should always re-ask the question out loud for clarity and to include those joining only with audio.

After the event

- Make sure to thank everyone who contributed - they are usually keen to know how many participated and some demographic statistics, which you will likely be collecting anyway.
- Archive any recording via your normal process (e.g., YouTube channel). Be sure to include descriptive text to make it easier for people to find your materials later. Make sure to share the recording with those who registered / attended, as well as via all of the channels used to publicize the original event.

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Panel discussions

LARGE GROUPS **ONE-TO-MANY** **STRUCTURED** **KNOWLEDGE TRANSFER**

This section was authored by Katie Pratt, Communications Director and Content Archivist at the Center for Scientific Collaboration and Community Engagement (CSCCE).

Rationale

A panel discussion allows three or four invited speakers to share their expertise, present an argument, or demo a new project or tool - and inspire subsequent discussion. Panels also provide an opportunity for members of your community to learn, grow, and come together.

Depending on your goals and set up, you might place more emphasis on the speakers or on the question portion of the program. For example, speakers could simply be a “warm-up” to a more open conversation on the topic. Or alternatively, the discussion between the speakers as they debate differing perspectives could be the main focus of the session.

The panel format can provide variety of programming as part of a larger meeting, and also offers different ways for participants to engage. It also gives you, as organizer, the opportunity to highlight a diversity of people and perspectives on any given topic, rather than the singular perspective often given in a plenary lecture.

Checklist

- [ ] Zoom or similar tool for meeting, but make sure you have a large enough license (or choose to do it through some other streaming service).
- [ ] Moderator/technical facilitator (ideally two people).

Before the event

- Prepare an abstract and scope for your panel which you can share with invited speakers so they know what they’re signing up for.
- Prepare a draft agenda with details about timing
  - Make clear to panelists how long they have at the beginning to introduce themselves / their perspectives, before a general Q&A.
  - Will slides or other presentation aids be used?
  - Will questions be open or moderated in some way? (An intermediate is to allow groups of 3 or so questions at a time, for example.)
- Contact the people you would like to present as part of your panel to confirm availability. Try to allow as much time as you can before the event for this.

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- Prepare an announcement/blog post to communicate with the audience you would like to engage. Share it with the panelists so they can invite their networks, if desired.
- Confirm final logistics with panelists a week before the event. Include technical tips and offer a couple of times for a "dress rehearsal" at which you can run through these things.
    - Consider scheduling a dry-run meeting of ALL the panelists together about a week before the event, if possible. This lets you and the panelists test the platform, clarify any questions about the format / aims, and also lets the panelists meet each other and share their expertise / perspectives / priorities, which will lead to a better panel discussion and also help a moderator (if applicable) know how to direct questions.
- Configure your waiting room and customize as desired, or prepare any opening / transition / instruction slides you might want to use as panel moderator.
- Assign a moderator and technical facilitator and get clear on each other's roles and responsibilities.
- Prepare your own questions for the panelists to facilitate discussion / questions from the audience.

During the event

- Hit record if you are archiving the event.
- Keep the panel to time.
- Be ready to switch presenter functions between panelists as required.
- Consider if you (or the technical facilitator) want to manually "spotlight" speakers by pinning their video in speaker view. It can bring more attention to the speaker, but then you might lose some of the non-verbal affirmations of the other panelists.
- Moderate the chat (e.g., technical questions, inappropriate behavior). This includes the chat window in Zoom and also any collaborative notes document you are using.
- Moderate the discussion, either by repeating questions in the chat box or inviting participants to speak up (depending on your settings this may involve you unmuting microphones).

Tips and tricks

- If you expect panelists to answer questions by monitoring the chat box or watching for raised hands, notify them in advance and show them how.
- If you plan on asking participants to register, asking a couple of questions in that registration will help develop a pool of questions for the Q&A session.
- If panelists will be using slides, they will need to know how to share screen/use presenter tools, or you should collect the slides beforehand and share for them.
- Advise them how you will communicate with them about timings e.g., will you use a buzzer, messaging or some other way to indicate when their talk time is running out.

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After the event

- Follow up with the panelists ASAP to thank them for their contributions. If there were unanswered questions from participants that you know (e.g., key stakeholders, funders) follow up and get answers if possible. Share the answers with those stakeholders.
- If you have recorded the panel, upload it to your sharing platform and distribute.
- Write up a news article/blog to complement the recording to share with your community to summarize key points.

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Collaborative Learning and Building Together

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Virtual study groups

SMALL GROUPS **SEMI STRUCTURED** **PRODUCTIVITY**

This section was written by Emmy Tsang, Innovation Community Manager at eLife. eLife hosts virtual study groups every week as part of their online training for the eLife Innovation Leaders Program (https://elifesci.org/innovationleaders). The format for these are largely based on and inspired by the Mozilla Open Leaders program.

Rationale

The key objective of virtual study groups is learning. The study group session is successful if all participants feel that they've learnt something/taken something away from the session.

WHO IS THIS FOR?

Participants should be *open to learning.* They could:

- Learn from each other – this requires that they are also open to *sharing.*
- Learn from someone else/something else not in the group together.

TYPES OF LEARNING ACTIVITIES:

- *Group discussions,* in the form of breakout rooms on Zoom. These allow more people to speak and share in a smaller and safer setting, and dive deeper in specific topics of interest.
- *Collaborative editing,* in the form of silently typing on a collaborative Google doc / slide / spreadsheet. These allow time for folks to digest, feedback and write.
- Host *speaker.* Assign a group member to give a presentation on a topic, or host a "guest"! The speaker's primary role is to share their experience and knowledge, so that everyone can learn from it.
- *Assignments.* Primarily used for consolidation of theories learnt – hosting these on the cloud allows easy feedback.

Checklist

- ☐ Zoom or similar tool for meeting, with breakout room functionality if you decide (see below).
- ☐ Google docs, hack.md, or etherpad for collaborative note taking.

Before the event

- Set and communicate topics and objectives:
    - Begin with "Questions" and "Objectives" – Participants should be able to answer the set questions after the session, and meet the objectives (for an example, see the Carpentries' template lesson).

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- Are there pre-call assignments/pre-requisites for the session? Make sure they are communicated well in advance.
- Prepare an agenda:
    - Duration: 60-90 minute calls work well.
    - Break the total time out into chunks – consider the different types of activities (breakout rooms, silent gDoc-ing, and presentations). A good mix helps to sustain momentum.
    - Format for note-taking.
    - Accessibility:
        - Make use of headings in gDoc to help screen readers navigate (i.e. add section headings and format into headings. You may also create a table of contents then if your document is more than a couple of pages in length).
        - Line numbers also help navigation. You can add line numbers to Google Docs with a FireFox add-on or a Chrome extension.
        - Be mindful of platform accessibility – it's almost impossible to choose something that works well for everyone, but make sure your decision of platform is communicated beforehand and provide links to guides for installation/set-up/troubleshooting.
    - Have your Zoom meeting link right on top of the agenda.
    - Share this with the group a week before the session, so folks have time to prepare.
- (Optional) Invite a speaker.
    - Invite them to add a link to their slides in the agenda beforehand – this is good for accessibility and also gives you an opportunity to remind them that they have to speak.
    - If this needs to happen often, consider having a speakers' guide to help put all the information for speakers' in one place.
- Set up a Zoom meeting.
    - You can use waiting rooms if you want – it may be helpful to assign a cohost to help moderate the waiting room after the call starts.
    - Use passwords to minimize the chance of getting Zoom-bombed.
    - Provide links to instructions to dial-in/access Zoom.
- Send a calendar invite.
    - Have links to the Zoom meeting and agenda in the invite.
    - If you have speakers/participants who are not familiar with Zoom, invite them for tech check 10-15 mins before the call.
- Decide if you would like to record the call.
    - Reasons to record: your group members find it helpful to have something to refer back to, other than the Google Doc, or you have group members that unfortunately had to miss out on the call real time (this happens frequently if you have members from across time zones).

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    - If you would like to record, you should let your speakers and participants know in advance, and give them an option to opt out of the recording (you will have to manually pause the recording when they're speaking).

During the event:

- (If hosting presenters unfamiliar with Zoom) tech check, 10-15 minutes prior to starting. Copy the link of the agenda into the Chat Box in Zoom. Do it multiple times! New participants into the call won't see the chat history.
- (If recording) Tell folks that you are about to record, give them an opportunity to turn off their camera if they prefer.
- Welcome everyone to the call:
    - (Optional) have a check-in question, e.g. what's your lunch? in the agenda, so folks who joined earlier can ease into the call and get to know each other more informally.
    - Introduce yourself as the host.
    - Introduce the expected behaviors on the call; if you have a Code of Conduct, summarize it quickly (what's encouraged, what's not allowed, how to report) and make sure there's a link to the full version in the agenda.
    - Give any newcomers a chance to introduce themselves to the rest of the group.
    - Verbalize the objectives of the call.
- Breakout rooms.
    - Think about how many mins you would like each person to speak, multiply that by # people per breakout room to get the duration of discussion. *E.g. 3 people per room, each speaking for 3 mins - 9 mins.*
    - Remind folks halfway through using the broadcasting function to allow everyone in each room to speak!
    - You can record breakout rooms if you ask someone in the room to do so – But, keep in mind that the environment in a breakout room is slightly more intimate, and folks may feel safer to speak their minds without the pressure of recording.
    - Pause the recording during the breakout room, otherwise you will be recording yourself and everyone else in the main room!
    - Reporting out:
        - ask someone in the breakout room to take notes for reporting out
        - Have a section in the agenda to allow folks to report out individually and non-verbally
- Presentations
    - Three basic elements in the agenda for a presentation: (1) a link to any slides, (2) a section for taking notes and (3) a section for Q&A; you could also have a useful links/resources section if it's helpful.

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    - Someone needs to (1) keep time and (2) take notes – you could delegate these to different group members, or you could do it yourself (though note taking is a learning exercise itself! Delegate if possible).
    - Q&A: encourage participants to add their questions during the presentation / upvote (by adding +1) to others' questions.
        - If there is time to have a discussion after the presentation, that's the best; if not, invite the presenter to address the questions asynchronously where possible.
- Facilitation
    - *Silence is fine*– sometimes folks need time to gather a response.
    - Ask open questions – if the group is new / there are new members, you could direct questions to specific people to encourage them to speak.
    - If it feels like no one is speaking, verbalize some points that folks have written to see if the writer wants to elaborate verbally.
    - Nod and smile, a lot (:
    - Summarize discussions from time to time, but keep them succinct – this takes practice.
    - Be aware of participants that are dominating discussions – you could use Zoom's private message to remind them to let others speak, or, in extreme cases, interrupt them directly.

Tips and tricks

- Set the tone– if you are casual, your participants are more likely to be casual. Even you making tech mistakes on calls can help build an atmosphere of co-creating and folks not being afraid to make mistakes of their own.
- If this is recurring – try not to start late, even if many people haven't turned up; same goes to ending on time.

After the event

- Have means to collect feedback– but also make sure it's something achievable (that you can follow-up on effectively).
    - Spend some time to think about what type of feedback you want and what you would like to hear– it will help you find the right format and questions.
    - Put a few feedback questions at the bottom of the gDoc to allow participants to provide feedback regarding that particular session asynchronously, noting that if it's something that needed urgent attention the person should notify you via some other means. *Example questions: What did you find surprising? What worked for you? What would you change?*
    - Do 1:1s with participants – I would recommend these in the middle and/or at the end if you are doing a series of sessions and folks are expected to follow a learner journey. They are time-consuming but you can gain highly valuable insight.
- Assignments

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        - The goal of assignments is consolidation; the assignments should correspond to the topic that was discussed.
        - Offer templates and examples to help folks work through the assignment.
        - Have a means for the group to share their assignments and offer feedback; or allocate time in a next session to share and reflect together.
- Share notes and recordings (if available) with the group, and follow-up on any action points.
    - Helpful to put the recording link on top of the notes doc, and the link to the notes in the recordings description.
    - Make sure there is agreement beforehand as to how much these materials can be shared beyond the group.
    - If this is recurring, it could be helpful to establish a location to store all the material, e.g. a shared gDrive, or a GitHub repo.

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Virtual co-working

SMALL GROUPS **ONE-TO-ONE** **SEMI STRUCTURED** **PRODUCTIVITY** **ACCOUNTABILITY** **MOTIVATION** **TROUBLESHOOTING**

This section is adapted from a blog post on the CSCCE website by Stefanie Butland, Community Manager for rOpenSci and CEFP 2017 Fellow, and Naomi Penfold, Community Manager for eLife and CEFP 2019 Fellow. There are additional contributions from Eva Amsen, a freelance science writer who has hosted in-person and virtual coworking sessions for science communicators.

Rationale

Virtual co-working allows colleagues from the same organization, or counterparts in other organizations, to work together synchronously via video-meeting. This setup affords the opportunity to help each other get unstuck, ask for advice on how to approach a certain project or task, or say "omigosh that is fantastic." For counterparts working across organizations, it is an opportunity to build an intellectual partnership through which they can share "good enough" practices, normalize their expectations outside of our everyday silos, and support each other. Seeing the to-do list of a fellow professional is also very helpful to adjust your own expectations about what is possible to achieve, without over- or under-loading yourself.

Co-working can also be an opportunity for people who normally work alone to connect with others in their field. For example, a group of freelancers or independent professionals may decide to create a co-working group in lieu of having colleagues at work. In this case, co-working creates an environment that inspires productivity by seeing others work on similar projects at the same time. These groups can evolve into larger communities, and may result in co-working sessions with more people than a smaller professional circle.

Checklist

- ☐ **A place to meet**: Google Meet, Whereby (free for up to 4 participants), Zoom (free unlimited 1 to 1 meetings; 40-minute time limit on meetings with 3 or more participants), Discord (free video for up to 50 people on desktop app; voice-only in browser-based software or phone app; permanent message boards on personal server to communicate in between sprints).
- ☐ **A shared timer**: "Cuckoo" timer https://cuckoo.team/ is a free browser-based shared timer split into work and break sessions (with editable time blocks and a customizable URL).
- ☐ **A tool to coordinate across time zones**: Timeanddate.com and its Event Time Announcer is great for scheduling and sharing unambiguous meeting times across time zones (example).

Before the event

- Find a co-working partner. You can directly invite a friend or colleague, or open up the invitation to others in your community.

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- For larger groups, you might want to have a place where they can interact and talk about the coworking sessions, such as a shared Google Doc, Slack channel within a larger community or Discord channel (if that's what you're using for video).
- Find a time that works for your co-working group (time zones can be challenging!).
- Decide on a video-conferencing platform that works for your group and share the dial-in information.

During the event:

- Start each session with each person saying what they are working on, and how they'd like to break up their time together into work blocks and discussion. Setting and sharing goals helps your coworking session participants stay accountable, especially if you end your meeting with a check-in to confirm with the group whether everyone reached their goals.
- Create the structure for your call and stick to it! Use a browser-based shared timer to work for a set time, then come back to check in with each other. For example, work for 45 minutes and then take a 5-10 minute break. You can play with different timing options and find what works best for you and your co-worker(s).
- At the end of each work block, report back to each other on accomplishments and/or struggles. These breaks can turn into work discussions. Some people might prefer to work through a break, so it's a good idea to make some breaks optional, as long as everyone checks back in at the end of the entire session.
- During work sessions, participants stay in the video meeting but mute audio and turn video off. During breaks, unmute and turn video back on to chat. Face-to-face time on video is important if you have the internet bandwidth to support it. Alternatively, if your video software does not support the full duration of your meeting, you can set up separate calls for each break and log off in between.

Tips and tricks

- The breaks are where the synergy comes. Feedback from someone who gets what you're doing in both a philosophical and detailed way is worth its weight in gold, and listening to how others have tackled a challenge you're likely to face yourself is really useful – it's a mutually beneficial exchange.
- Keep it small:
    - Beyond 3 people, it takes longer to get into everyone's challenges and it's harder to build depth in the relationship, so it's a less effective use of everyone's shared time.
    - Beyond 10-12 people, it becomes infeasible to have everyone share their goals during the meeting, so if you do have a larger group you might consider using text forums or chat to allow people to set their goals. Larger groups can still benefit from shared work sprints, even if it's harder to form relationships with the group.
- Share the organizational responsibility: rotate the responsibility for coordinating session times, setting up the video call and sharing calendar invites. Once you've established a routine with a

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small group who are committed to attending, you may end up with a regular slot, e.g., every second Monday morning.

After the event:

- In the final part of your meeting, check back in with everyone and reflect on the goals they set at the start and the progress they made.
- Thank your co-working partners and set up your next co-working session if it was effective for you.
- Acknowledge the helpfulness of the session on a community forum. This is particularly important if you are trying to encourage others to adopt this model as a means of building community: Co-working partnerships are communities of practice in action.

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Virtual office hours

SMALL GROUPS **NOT STRUCTURED** **TROUBLESHOOTING** **TEAM BUILDING**

This section was authored by Lou Woodley, Director of the Center for Scientific Collaboration and Community Engagement (CSCCE).

Rationale

Hosting regular office hours can be a good way to build connections between colleagues, learners or community members and to troubleshoot any questions or challenges they may be encountering in their current work. For example, if you're running an online course, office hours can be helpful for discussing that week's homework. Or if you're coordinating several community leaders, each of whom are running different projects, office hours can give them an opportunity to get to know one another and identify common infrastructure and knowledge that they can share, such as welcome email templates, engagement tips or other logistics.

Office hours typically work best if there is a general theme for each session which helps to create a motivation for people to show up e.g. by aligning with what is being taught in a course or the stage of a project that community leaders are currently at.

Checklist

- ☐ Zoom or a similar tool for meeting.
- ☐ Google doc or other virtual note-taking tool, if this will be helpful. You might include different sections where learners can add questions ahead of time as well as during the call. You might also add a section for attendees' names, especially if the community leaders or learners haven't yet interacted (much) with one another.
- ☐ Slides, if necessary, to briefly recap a topic or highlight resources.

Before the event

- Decide on a theme or topic for the office hours - whether that's the topic being covered in a course, or considerations relevant to the stage that a set of projects has reached e.g. "How to make a project plan for your upcoming conference workshop."
- Share details of the event with those that you're hoping will attend.
- Decide whether you need participants to come for the whole event or whether they can turn up at any point during the hour.
- If the event is a drop-in event, will participants need to indicate e.g. in the Google doc when they plan to show up and ask questions?

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During the event:

- Encourage participants to support one another, wherever possible, rather than trying to take on the role of expert with all the answers. This will help to build connections between members as well as reinforce the expertise of others on the call.
- If running a drop-in event, be sure to pause at a good point in the flow and welcome any new joiners (ideally within a couple of minutes of them joining the call). Without putting them on the spot, help them to feel welcome by asking how they are or giving a quick recap of the current conversation so that they are able to join in.
- If the event is not a drop-in but a fixed time, decide on a structure for the event e.g. will you spend 5 minutes at the beginning outlining how participants can ask questions, or give a short recap of the materials to help orient everyone to the topic for the session. This shouldn't be a long presentation but rather a few pointers to start conversations.

Tips and tricks

- You may need to experiment with an appropriate frequency for these events and whether to have specific themes. If they're too often and optional then busy members may not attend.
- If you're running a drop-in model make sure that you indicate that it's fine to drop-in at any point and leave at any point and reinforce this e.g. by being welcoming to new joiners and thanking participants as they leave.

After the event

- If you've used a Google doc or other virtual note-taking tool, tidy the notes into a referenceable format, convert to view only, and share back with the participants.

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Collaborations workshop

MEDIUM GROUPS **LARGE GROUPS** **STRUCTURED** **PRODUCTIVITY**

This section was authored by Rachael Ainsworth, Research Software Community Manager for the Software Sustainability Institute (SSI). The SSI runs an annual Collaborations Workshop (CW) unconference series, which brings together a range of stakeholders (researchers, developers, innovators, managers, funders, publishers, leaders and educators) to explore best practices and open issues related to a given theme. One of the sessions within CW is the Collaborative Ideas session.

Rationale

A Collaborative Ideas session connects changemakers in order to identify issues within the community and propose solutions. For example, participants can discuss the work they're doing, work they would like to do, or problems they are facing. Other people in the group can then talk about how they could help get the new project off the ground, or help solve the problem. It is output, interaction, and collaboration focused. It is also an excellent way of generating project ideas for a hackathon, and participants can be further motivated through competition for prizes.

Groups of 6 are randomly assigned to breakout rooms, providing participants the opportunity to network and collaborate with new people. Once participants arrive in their breakout rooms, they should introduce themselves, select a chair and a scribe, and take it in turns to introduce something about their work that is important to them. It can be anything: a new project they want to start, a policy that they want to see adopted, the skeleton of a concept that they want flesh out, a tool that they want built, or a problem that they face. The group then makes a decision about which idea is most likely to be taken forward and helps the scribe complete a Collaborative Ideas form. To focus the discussion, the output should be an idea that a team of 3-6 people could work on, for example, during a hackathon.

The outputs of this session are the Collaborative Ideas forms generated by each group, which should capture the following information:

- Idea title.
- List of participants/authors.
- Context/research domain: one or two sentences that will help readers understand where the idea comes from (e.g. a specific field of research, a general field of work or something wider).
- Problem: a couple of sentences that describe the problem that the idea will help solve (~25-100 words).
- Solution: a couple of sentences that describes how the idea will help solve the problem (~200-500 words).
- Diagrams/images: links to any diagrams or images that support the idea. It could be something the group created, or it could be an existing image from the web (make sure to include appropriate license and attribution information).

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- Any other notes from the discussion can be preserved at the end of the form.

The generated Collaborative Ideas can then either be reported out by each group or read asynchronously and then voted on, where the groups with the best collaborative ideas could win prizes.

Checklist

- [ ] Zoom or similar tool for meeting, but make sure you have a large enough license (or choose to do it through some other streaming service).
- [ ] Slack workspace (optional - useful if part of a wider conference) with a help desk channel to assist with technical issues from participants. Groups are also able to create their own channels to communicate and easily share resources outside of Zoom.
- [ ] Collaborative Notes/Agenda with instructions and relevant links.
- [ ] Session facilitator/host to give instructions and manage breakout rooms.
- [ ] Session co-host as back up and to help with participant management and technical issues if there is not a dedicated help desk.
- [ ] Collaborative Ideas form for each group.
- [ ] Mechanism to manage and share links to the group outputs (e.g. a Google spreadsheet with a tab containing links to each of the group's Collaborative Idea forms).
- [ ] Mechanism to vote on the group outputs (e.g. another tab in the Google spreadsheet to enable voting).
- [ ] Sponsors (optional).
- [ ] Prizes (optional).
- [ ] Feedback form.

Before the event

- Identify a theme(s) for the Collaborative Ideas session in line with your community to help promote, motivate, and focus the session. If it is taking place as part of a wider event, then the theme and background of your participants should already be determined.
- Do you want to award prizes to the best Collaborative Ideas generated during the session? Do you have a budget to facilitate this or do you need to seek sponsorship?
- Communicate session details, code of conduct, privacy policy, agenda and any other expectations via a website or registration page.
- Test the Zoom meeting room and ensure all desired settings are enabled (breakout rooms, co-hosts, screen sharing, recording). Practice creating breakout rooms.
- Create the Collaborative Ideas form (for example, as a Google Doc) template.
- Generate a number of templated documents appropriate for the number of groups in the event (and assuming 6 participants per group, for example) or allow the groups to generate their own documents on the day.

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- Have a mechanism to share and manage the links to the group outputs (for example a Google Sheet). Add instructions and associated links to the agenda/collaborative note-taking document.
- Have a mechanism for voting on the generated Collaborative Ideas (for example, another tab in the spreadsheet to capture votes).

DAY BEFORE EVENT

- Do one last check of links and instructions.
- Ensure participants will have edit access to the Collaborative Ideas forms.
- Finalize any presentation slides if needed.
- Communicate connection details (such as links to the Zoom meeting room, collaborative notes document, Slack workspace) to registered participants.

During the event

- Provide clear guidance and motivation for the session (for example, spend 10 minutes explaining how the session will run, what is expected of participants, providing advice and communicating the timeline).
- Communicate when the Collaborative Ideas forms will "close" and voting will start.
- Dedicate time to answering any questions.
- Automatically create breakout rooms with groups of up to 6 people.
- Broadcast guidance and timekeeping to breakout rooms throughout the group work (e.g. alerting participants to how much time they have left and when they should begin writing up).
- Close the breakout rooms at the designated time and bring participants back to the main room.
- If in competition for prizes, explain how the voting will work. Close edit access to the Collaborative Ideas forms at the specified time (this is so that all groups and participants have equal amount of time to work on them).
- If you plan for groups to present their generated Collaborative Ideas, it might be good to take a short break now, and then allow each group 5 minutes (for example) to report out their Collaborative Ideas in the main room (with the option to share their screens). Otherwise, explain how long groups have to read each other's Collaborative Ideas forms (which should have all been compiled and shared).
- If in competition for prizes, close voting at designated time and announce winners!

Tips and tricks

- The limiting factors for a Collaborative Ideas session include the number of participants and breakout rooms your Zoom license allows for, as well as the amount of time to read or report out the outputs and vote.

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- This type of session has had success as a 90 minute session within a wider unconference format (plus time throughout the unconference to read and vote on the outputs) with an order of 100 participants.
- It's a good idea to keep groups to a size of 6 people or less, as it is difficult for all participants to feel included and contribute within larger groups.

After the event

- Thank your participants for their engagement and ask for their feedback (for example, via a Google Form).
- If the session was run in competition for prizes, get contact details for winners and send prizes.
- Publish or share the generated Collaborative Ideas if in line with the event's privacy policy and/or with permission from the participants/authors.
- Bring forward and work on the ideas in a do-athon/hackathon!

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Collaborative sprint

MEDIUM GROUPS **LARGE GROUPS** **STRUCTURED** **PRODUCTIVITY**

This section was authored by Tom Quigley, Community Manager for Conservation X Labs and CEFP 2019 Fellow.

Rationale

A collaborative sprint is an event format where community members join during a fixed timeframe to create a new solution to a problem or collaborate on a major work effort. Familiar formats of sprints include hackathons, ideathons, game jams, or design sprints. Sprints can be linear (i.e., multi-hour events, all sessions in a row) or distributed (i.e., many individual sessions spaced out through a longer time period, say 24-hours).

Sprint-style events are a good fit if you would like your members to complete a large output that requires a lot of work input. They are also particularly good for outputs that require collaboration between many team members to complete the work. By creating an exciting and recognized event (e.g., by publicizing on social media or on your community platform), you can effectively motivate people to spend a dedicated section of time focusing on working with their colleagues on a specific project. For collaborative outputs, since they know that other team members will similarly be marking off time, it allows for a long stretch of co-working that can rapidly move a project forward.

An example of a sprint-style event is the Virtual Ideathon held by Conservation X Labs in April 2020. We organized a six-hour event where attendees formed teams, watched expert presentations, and followed a series of exercises to shape problem statements and generate ideas for using behavior change to address conservation challenges. Around 60% of registered teams joined on the day of event, and nearly 100% of the 100+ participants who joined stayed for the entire event, resulting in 33 new independent project ideas for changing behavior to address extinction.

The sprint is a unique style of event that can engage your community, teach new skills, generate real-world outputs, and make your community programming stand out. It involves slightly more complexity than a webinar format, but with proper planning and preparation, it can be a hugely successful event that your community will love.

Checklist

- ☐ Online platform(s) to hold social or video events.
- ☐ Chat tool (such as Slack) or other internal tool to communicate between facilitators.
- ☐ Form software for registrations & surveys.
- ☐ Place to host documentation about the event (schedule, FAQs, any pre-event tasks).
- ☐ Email software to bulk email participants and volunteers (such as Mailchimp).

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Before the event

- **Start with the 4 Ws (and H):**
    - *Why* - your goals & outcomes. What do you want participants to take away from this event? What tangible outcomes do you want to achieve?
    - *Who* - who do you want doing these actions? Are they going to work individually or in teams?
    - *What* - what tangible actions or activities will you provide, or ask your participants to do, in order to reach your goals and outcomes?
    - *When & How* - Will you do a linear sprint (i.e. 6 hours straight) or a distributed sprint (i.e., 6 sessions of 1 hour each spread over 48 hours)? Weekend or weekday? Consider your users' time zones.
- **Decide what type of sprint to run.**
    - Common formats for sprints include:
        - **HACKATHON** Originally an in-person 24-48-hour event, these have increasingly migrated online. In these events, teams create a prototype of a product idea in a closed timeframe. Common names for this type of event: 'hackathon' is a general catch-all but originated with software development; 'game jam' for game development, and 'makeathon' for engineering.
        - **IDEATHON** Rather than building a prototype in a closed timeframe, participants focus on creating the best idea for a project. Outputs can look like written project proposals, live pitches, pitch decks, or other types of presentations.
        - **DESIGN SPRINT** Teams take on a thorny problem in an existing project, where the solution is not known or obvious. Over the timeframe, they work to generate an innovative solution to that problem.
        - **WORK SPRINT** Teams take on a major section of work in an existing project, where the solution is generally known. Over the timeframe, they work collaboratively to complete the work.
    - Aspects of sprints to consider:
        - **COMPETITIVENESS** Will your teams submit their projects to compete against each other? Will one or a few teams win? How will you judge who wins? Who will judge, and by what criteria?
        - **AWARDS / INCENTIVES** What can you provide that would incentivize people to attend the event? Can you provide a "gift bag" of discounts or free trials? What would you provide to winners, if you are running a competitive event?
        - **TEAMING** Will participants join in teams or individually? Can they register individually and then find teams, or must they register with a team? How can interested individuals find teams? What do people who join at the last minute do on the day of event?
        - **LINEAR VS. DISTRIBUTED**

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- Will you run your event straight through, or break it up into chunks in a timeframe?
- Linear (i.e., 6 hours straight):
    - Pros: Lower risk of teams dropping off before the end of the event; higher engagement during the event; ensures that teams work through a series of steps.
    - Cons: Can be hard to balance this with work and life, likely needs to be held on a weekend; time zones make global participation a challenge; not ideal for projects that require more than 6 hours to complete.
- Distributed (i.e., three two-hour sessions within 24 hours):
    - Pros: less grueling than sitting through an entire event; breaks are built into the schedule; 'building time' (for teams to work together offline) is incorporated.
    - Cons: If you miss the sessions, it can be difficult to keep pace; less structure = less clarity on what to do at any specific time; higher risk of losing teams or individuals to attrition; "work by yourself" can have less of a social or community feel.
- Resources:
    - SPRINT: Solve Big Problems And Test New Ideas In Just Five Days.
    - Major League Hacking – a guide to running hackathons.
    - Devpost resources – a resource for hackathon managers.

- **Mock up a rough schedule for the day.** For each time block, consider what actions your participants will take and where they will take them (i.e., in a webinar room, in a breakout room, in a chat channel, etc.).
- **Choose your tools.** Based on the actions that you need your participants to take, you may select from a number of different tool types. Try to pick the fewest that you absolutely need to achieve the outputs & actions that you've defined earlier. Examples:
    - Webinar (one-to-many video): Zoom, YouTube Live, Crowdcast, GoToWebinar.
    - Breakout rooms: Zoom, Hopin, Accelevents, Airmeet.
    - Networking: Remo, Icebreaker.video, Toasty.ai, Hopin, Airmeet.
    - Collaboration: Google Docs/Sheets, Mural, Miro, GitHub, CADLAB.io, Figma.
    - Group chat: Slack, Discord, Microsoft Teams, Rocket.Chat.
    - Coordination: Mettl, Devpost, Commsor.
    - Communication: Slack, Drip.com, Mailchimp.

- **Determine if you need NPCs (non player/participant characters).** These are individuals who are not active participants in the event, but play a role in moving it forward and providing value for participants. Roles that you might consider:

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- **Facilitators**. This role is meant to work with teams to ensure they understand the activities, while also being there to answer questions, surface tech support issues, and keep the team on schedule. Facilitators are also very useful for "opening" breakout rooms (making sure everyone is in attendance and knows what to do) and "closing" breakout rooms (wrapping up the activities and shepherding participants to somewhere else). We found that a facilitator can handle between 3-5 breakout rooms without getting overwhelmed, but this is completely dependent on how much the facilitators are being asked to do in each room.
- **Support staff.** Dedicated staff for solving tech or other issues that individual participants may face. You will want this to be a technical person with a deep familiarity of the platform(s) you are using and how to solve common technical problems. They should also be able to communicate solutions easily and clearly to participants. You'll want to give your participants a direct line to this person, for example, a "tech support" channel on Slack.
- **Mentors**. Depending on the activities at your event, you may consider selecting skilled and knowledgeable individuals who can act as mentors to teams. Keep in mind that including mentors in your event adds an additional level of complexity and programming, as they will require different training and day-of coordination than facilitators or participants. There is definite benefit to both the teams and to the success of your event, but there is a cost to coordinating mentors.
- **Presenters.** Keynotes, webinars, workshops, content generators - you may need to bring in some additional expertise to generate content for the event. Some of these may be obvious, but in shaping your event, consider where you have opportunities to bring in external partners to generate content.

- **Train your NPCs.** Any additional collaborators you bring on will need training prior to the event. You should conduct this training within the week before the event so that the instructions and platform are fresh in everyone's mind prior to going into the event. Coordinate the timing of that meeting well in advance to ensure you have a time that works for the most people. Using whenisgood.net or Doodle can help you find good timeframes, then pick the time that works for most people, share a calendar event, and make sure to record the training session so you can send it around to those who can't make it.
- **Have a Plan B.** Maybe your internet goes out, maybe your presenter unexpectedly cancels, maybe the platform unexpectedly crashes. Little mistakes happen, but big disturbances can throw off the entire event. Think like a risk manager: Where are the biggest failure points? What can you prepare beforehand to mitigate this risk? DURING the event is not the time to make these decisions. Prepare a Plan B for each of your biggest failure points so you can minimize risk. (i.e., have a presenter send you their final presentation with notes beforehand so someone else could present the content in a pinch, or prepare a video link on another platform to be ready in case of platform failure, etc).

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SCHEDULE

- **Don't wait until your schedule is "final" before dry-running it with real people**. Your "final" schedule will likely change significantly based on what you learn from the dry-run. Test early and often, especially if you are not deeply familiar with the platform(s) you've chosen.
- **Test your programming on real people**. This doesn't need to be in a dry run. If you have activities, send them out to a few small groups to give feedback. Ask people to work through them and see if the outputs are what you are hoping for. Tweak as necessary. If you have prepared content, do a "red carpet private viewing" with a small audience such as friends and family. See what types of questions they have at the end. Practicing will make your content better, too.
- **Watch out for too many "transition periods" in the schedule**, where participants need to move from one virtual "room" to another. Every transition period is an opportunity for participants to get lost, confused, or have a tech issue. Try to minimize the number of movements, and the number of different rooms.
- **Be conscious of participant attrition**. Transitions between platforms, long gaps in a linear schedule, and *any* gaps in a distributed schedule, are all opportunities for users to quietly close their computers and leave. You may:
    - **Minimize transitions –** online events that run for two hours or more still need breaks for your participants to take care of their personal needs. If you decide to eliminate bio breaks from your event, which may help with attrition, communicate that to your participants ahead of time and empower them to take breaks as they require.
    - **Socialize transitions** – in order to help with attrition after scheduled breaks, put programming in place to make sure attendees come back. For example, include a strong incentive after the break or facilitate social connections that ensure participants want to return and support their colleagues. Forming teams or introducing participants to a "discussion buddy" prior to a break can help build these connections.

DRY RUNS (primarily for linear events)

- Run at least two, if not more, dry runs before your main event. The goal of these events is to learn from the reality of what your participants will end up doing on the actual day of the event (hint: they will surprise you). You should ensure that you have enough time and capacity to make changes to your programming based on what you learn. For linear events, I recommend:
    - **Alpha** – at least four weeks prior to the event, with three-six participants, for one hour. Primary goal: test your tech platform. Run a very rough schedule and figure out where you may run into speed bumps.
    - **Beta –** at least three weeks prior to the event, 6-10 participants, one hour. Primary goal: test your specific actions. Run a schedule around specific actions you'll need participants to take, figure out where they were unable to do so.
    - **Dry run –** at least two weeks prior to the event, 6-10 participants, one and a half to two hours. Primary goal: test your content. Run a compressed day-of schedule that incorporates what you learned from your past two dry runs; ensure that your revisions

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have helped, not hurt. Test some of the content of the event (particularly instructions, activities, or demos).

- **Dress rehearsal** - within one week of the event, 10-30 participants. Primary goal: test your event. Run your final schedule as close to the full time as you can. This should mirror the day-of event as closely as possible.

- **General notes**
  - If you can, invite new participants each time you do a dry run. If you have repeat participants, their actions will be informed by their past experiences. That could impact the results - for example, if they already are familiar with the platform, or if they get confused because the schedule is different from the last dry-run.
  - Of these four, Alpha and Beta are most important, particularly if you are using an unfamiliar platform. Do these as far in advance as possible.
  - You may want to put out the call for 'dry run' participants to your community very early on in your event planning, so that for each dry run you can reach into an on-hand bank of willing volunteers, rather than scramble to recruit each time (and better to have one ask than four).

- **Notes on Alpha** - Watch closely for unique tech details that may impact your event. For example, you may have scheduled both a Zoom Webinar and Zoom breakout rooms for your event, only to discover in a dry run that they're two different services and you will need to have everyone *leave* one call, *join* another call, and *then* enter breakout rooms. Ask questions like:
  - Can my users join the event successfully?
  - How much of the platform functions are clear to my users (profiles, chat, etc)?
  - Any audio / video troubles? Wifi connectivity troubles?
  - Any troubles with screen sharing, split-screening, or playing pre-recorded videos?
  - Any obvious pain points when trying to run through the early schedule?

- **Notes on Beta** - Create a schedule for the dry-run that tests the **specific actions** that will be required of users. Testing these specific actions, rather than trying to run a hyper-smooshed version of your real-life event, will give you critical information about where exactly the virtual speed bumps are for your participants. For example, in your event schedule itself, you may ask a group of participants to watch a central presentation on mute in a main room, then leave the main room and go to their individual breakout rooms. In the dry run for this example, you would want to test:
  - Are all my participants muted in the main room?
  - Can they all see and hear my presentation?
  - When prompted, do they all understand what to do?
  - Can they successfully complete the next step?
  - When in the breakout room, do they know what to do without being prompted?

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- **Notes on Dry Run** - Functionality is necessary, but not sufficient, for a successful event. If the platform is functional but the content isn't strong, the event still won't reach desired outcomes. The past two dry runs have been focused on functionality for your participants; this dry run is focused on (1) making sure the changes you have made are actually useful, not harmful, and (2) testing the activities that you want participants to accomplish. Test your participants' understanding of your instructions for any activities in the event, the goals and outcomes of the event, and how the schedule will work, including roles of support staff, facilitators, or mentors.
- **Notes on Dress Rehearsal** - This is less mandatory than the first three. Completing a dress rehearsal will really depend on how many willing participants you can muster, how much time you can ask of them, and how much capacity you have prior to the event.

PROMOTION

- The few days before a deadline are the days that most people will sign up. Push hard on promotion during that last week.
- Complexity of the event will relate to your promotion deadlines.
    - If your event is conducive to people joining at any time prior to the event, then you can keep registration open up until the event starts, or even during.
    - If you have administrative work you will need to do with participants prior to the event (such as matching individuals into breakout rooms, pairing mentors to teams, generating unique content for each team, etc.) then consider how much time it will take to complete that work and close registration in advance to give yourself that much time prior to the event.
- Prepare shareable content for your participants, and put it in front of them at intervals before and during the event. Decide on a shared event hashtag that participants can use before and during the event. You could even create unique hashtags for participants to complete activities in public (for example, to drive finding teammates, encourage the use of #JoinTheDreamTeam to create a list of people looking for teams - that also acts as participant-generated content to promote the event on social media).
- Share as much about the event with your participants as you can. Sharing the schedule, the platform, video walkthroughs, expectations, etc., will prepare participants beforehand. Not all will take advantage of this, but you will hopefully minimize support on the day of event.

During the event

- **Have a back-channel for your NPCs.** As the organizer, you are going to be needed in many places - your NPCs will handle most of the interactions with teams, but they will need a way to reach you when needed for high level decision making. Ideally, they can also support each other. A channel in Slack, a video call running with organizers in the background, or a dedicated and heavily monitored email address for support will allow your NPCs to come to you with the most important questions (both from them and from attendees).

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- **Have clear pathways for participants to find support.** Publicize a mechanism where your participants can get support. Doesn't matter if it's tech problems, clarifications, moral support - have one place for participants to go to, and make sure they know where it is. A dedicated email address, a dedicated NPC, or a dedicated chat channel are all good options - pick one channel and point everyone towards it on the day.
- **Publicize the answers to common questions.** If multiple people have raised a question, it's likely there are many more that are silently wondering the same thing. Announce the answer to the group, and point members to a place where frequently-asked questions are constantly updated with answers (for example, a shared FAQ Google doc).
- **If you miss a note - just keep playing.** Things *will* go wrong. The most important thing is that when they do, the event doesn't stop. Spend a bit of time trying to correct course, and don't be afraid to make the decision to move on. Communicate with your participants what is happening, but crucially, try to stick to schedule. A dropped keynote may confuse participants for twenty minutes, but being twenty minutes behind for the rest of the event will confuse participants for the rest of the event.
- **Give shareable content!** Your participants will be excited about attending. Leverage that for promotion. Ideally prepared in advance, you should prompt your attendees during the event to share content in community or public spaces. For example, prompt them to take a selfie during a livestream and share it on social media, or prompt everyone to take a "group photo" screenshot of their breakout rooms (note: when sharing photos on social media as the organizer be sure to have permission first, e.g, through an agreement on a registration form).
- **Have a payoff.** Even if you are not having a competitive event, you will want to highlight the outputs of your participants somehow, and your participants will want to have some sort of feel-good moment as a payoff. They will want recognition for the work they've put in, and for people to pay attention to their particular solution, often in a presentation. This can be tricky to manage considering the amount of time it takes, but keep in mind that this is a must - *somehow*, showcase the outcomes of individual projects, and let participants know *from the beginning* how this showcase will be done so they aren't surprised or let down.
- **Ensure you are capturing the outputs of the event, *during* the event.** Once participants leave, your engagement with them will drop to around 50% - which means you will lose data on approximately half of the outputs of the event.

Tips and Tricks

- If running an in-person event is like herding cats, then running a virtual event is like herding cats while wearing a blindfold. Your attendees will be on the other side of a screen and you won't have a great way to know which way they're running. Try to minimize complex actions as much as possible, and use your dry runs to understand where people are getting lost.
- Written instructions in a central place are more effective than spoken instructions at a specific time. Ideally, do both.
- Don't panic!

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After the event

- Immediately:
    - Thank your NPCs profusely - let them know that a survey is incoming this week.
    - Survey your participants.
- Day-ish after:
    - Gather results from the event - outputs, number of participants, number of countries in attendance, number of partners, etc.
    - Survey your NPCs.
    - Communicate initial results to your NPCs.
    - Survey reminder for participants.
- Week+ after:
    - Reminder about survey for participants and NPCs.
    - Gather results from event and put into shareable format.
    - Promote the success of your event!
        - Send results to participants in a nicely-designed, shareable format.
        - Give them content to share, for example links to tweets and images they can reshare.
        - This is a good opportunity to capture email addresses and generate interest for your next event. If you intend to run another, use this opportunity to recruit for your next event!
    - Leverage community enthusiasm.
        - You will likely have people emailing or mentioning in surveys about how excited they were. This is a great opportunity! Save quotes for testimonials, follow-up with requests to be a community ambassador, or recruit NPCs for your next event. Make the most of that post-event community glow.
    - Analyze results of survey from participants and NPCs.
    - Conduct a post-mortem with your team.

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