TIMELINE AND CHECKLIST FOR ORGANIZING ONLINE WORKSHOPS/TRAINING

4-5 weeks before the event

- ☐ Prepare the main goals/ideas of the event, and the strategy (concept) to meet them:
  - *Design a brief for the event with a clear indication of learning goals and the audience first. Tailor the strategy to fit them.*
- ☐ Guiding questions that will define the next steps:
  - Will the event be open for the public or is it designed for a specific audience?
  - Will the event be free or paid?
  - Is there a limit to how many people will participate in the event? Does the platform you have chosen to host it in have a participation limit?
  - Will the content be recorded and posted online later? If yes, does the platform allow recording? Where is the recording stored? Note: make sure to take into account the GDPR rules when recording participants and ask for their consent to be recorded.
  - Will participants require registration to attend? Does the platform you have chosen offer a customizable registration page? Note: make sure to take into account the GDPR when asking participants to register. Specify for which purpose this is being asked and how the information will be used.
  - How will you promote the event?
  - What is the best time for the event?
  - How will people access the event? Does the platform you have chosen allow for browser access for those who cannot download the application?
- ☐ Choose the right platform to hold the event based on its strategic goals and practical needs/type of event you are hosting (e.g. webinar, workshop, training, panel discussion, etc.)
- ☐ Re-think the timing of the event and schedule in breaks
- ☐ Create a registration form with short and clear event overview, speakers, remote access instructions and registration information
- ☐ Start promoting the event with the registration link (if the event is open for public) or send the link to the designated audience
- ☐ Test the platform you have chosen extensively with your colleagues on different devices

3 weeks before the event

- ☐ Continue testing the platform from different accounts and, if and when possible, different internet connections and devices
- ☐ Check the status of registration keeping in mind that, in general, only up to 60% of those registered will actually attend the event
- ☐ Designate a moderator for the event.
  - *The moderator will be responsible for the introduction of house rules, speakers, moderation of any discussion and Q&A and the general flow of the event*
- ☐ Designate a host for the event.
  - *The host will be responsible for all logistical arrangements prior to and during the event, including soundchecks, collection of materials, setting up polls/questionnaires, breakout rooms, dealing with technical issues as they appear.*
- ☐ Designate a back-up host for the event.
  - *This back-up host will join as a co-organizer and will perform the host duties in the event of emergency (internet connection is lost, computer problems, etc.) during the event.*
- ☐ Collect emergency contact information of all speakers/moderators/support staff involved in the event.

2 weeks before the event

☐ Schedule and conduct soundchecks with all speakers/moderators and anyone else that has an active role beyond simple participation in the event.
Depending on the size of the event, it is recommended to conduct the soundchecks 2 weeks prior to the event should the event be part of a larger conference/virtual event, and 1 week prior for stand-alone events.

☐ Prepare the guide with practical information on how to join, what to do, and instructions in case there are some technical problems for the moderators and speakers.

- *Depending on the size of the event, these may be communicated during the soundchecks and/or in a separate communication.*

1 week to 2 days before the event

☐ Conduct previously scheduled soundchecks.

☐ Designate a person responsible for social media during the event.

☐ Make sure all the speakers/moderators/support staff either have a link to the event, if it is an open event, or have registered in the online platform to have access to the event.

☐ Collect all the materials for the session (e.g. PPT presentations, links, other documents) from all the speakers/moderators

☐ Prepare and share with the moderator introductory slides with house rules and any technical information that needs to be shared with participants

☐ Prepare an evaluation questionnaire to be sent after the event.

☐ Send a reminder to all participants with instructions of how to join the online event

☐ Send out the guidelines to speakers/moderators

☐ Set up all the materials in the online platform or a document from which you could copy/paste information in the chat during the event

☐ Prepare 2-3 questions in case there is a lag between the presentation and the Q&A to encourage the audience to participate

The day of the event (in the position of a host)

☐ Open the event for speakers/moderators/support staff at least 30 minutes in advance to clear any last-minute technical difficulties and go over the programme

☐ Before the meeting, close all unnecessary programs on your computer to avoid distraction (e.g. mail, skype etc.)

☐ Stay alert to participants' complaints: try to assist in resolving individual issues

☐ Keep an eye on the channel of communication you had previously established for participants' questions

☐ Be ready to jump in to cover the moderator should (s)he be experiencing technical difficulties

☐ Keep track of time and communicate with the moderator in case of a serious delay

☐ Be patient with participants as they join the event, they might be dealing with connection challenges and/or settings customization issues

☐ Include a welcome message for the participants in the chat

☐ Share any necessary links for the start of the session

☐ Make sure all participants and inactive presenters are muted or not, depending on the way the event is designed

☐ Send an e-mail to those who registered but did not attend with links to materials and recording (if any)

The day after the event

☐   Upload the recordings and slides (if any) online

☐   Send out the evaluation form

☐   Send a thank you e-mail to participants with links to materials, recording (if any)

NOTES ON PLANNING AND PREPARATION

LOGISTICS

- **Start** well **in advance**. 4-5 weeks would give you enough time to reshape the event and advertise it. Note: choosing a tool for your online event, unless already available, might take several weeks. Be mindful of calculating this time into the overall planning schedule.
- **Choosing the right online platform:** consider maximum number of users, costs, technical requirements to host and to participate, recording and archiving, privacy policy, type of online activity envisaged, etc. Not all online platforms serve the same needs.
- Online events need just as much **people power and logistical arrangements**, as in-person events. Make sure to distribute the roles and responsibilities accordingly:
  - **Hosts:** essential like never before, yet invisible. These are the people that drive the session from its start to its end, making sure the platform works as it should, technical challenges are dealt with on time, and session logistics are implemented as agreed. Make sure to have backup in case of local technical challenges at host's location (for example, sudden internet or hardware problems).
  - **Moderators:** Online discussions can turn messy with several people speaking at the same time. It is the job of a moderator to make sure people know the rules of engagement and follow them. Make sure to provide the moderators with sufficient training on the online platforms and guidance on how to manage the discussions online. **Moderator's tasks** include coordinating the speakers, the sequence of their presentations and other activities, presentation of the session and the speakers, monitoring and gathering of questions from the audience, keeping track of time and making sure the speakers don't exceed their allocated slots. Should the audience be shy with questions, it falls on the moderator to engage them, which often means having several questions prepared ahead of time.
  - **Communicators:** depending on the size of the event, one or several people should be tasked with promoting the event as it is happening on social media. While it is great to circulate the hashtags of the event among the participants, one should not count on them to generate buzz around the event.
- **Soundchecks**: not everyone is an expert on effectively delivering engaging content online. To allow the speakers and moderators to practice, as well as to establish an overall flow of the session and train in the online platform that is being used for the event, it is recommended to schedule soundchecks with speakers, moderators and hosts well in advance. Soundchecks can last between 30 minutes to an hour depending on the amount of speakers per session and the complexity of the session logistics. Make sure that all technical aspects, such as microphones, cameras, screen sharing functions, etc. work properly during the soundcheck. Encourage speakers to use headphones with a microphone to eliminate background noise, as well as hardwire their internet connection.
- **Remote access map for larger events**: with the multitude of meetings scheduled per day, participants can easily get lost in all the links and different online platforms sent to them. To avoid confusion and remove the element of tension, have a full programme of even with links per sessions (remote access instructions) prepared and distributed in advance.
- **TimeZones**: be mindful that your participants might be joining from anywhere in the world. When scheduling the event, think about what time would be the most appropriate for all, and specify the time zone in the announcement.
- Ideally, each session will last **no more than 1,5 hours**, allowing for an additional 30 minutes buffer should the session be delayed. Should you choose to extend the event to half a day, make sure to include short breaks into the sessions, allowing people to stretch their legs, use the bathroom, grab a beverage of their choosing and comfortably return to the session.

- **Spread the event over several days/week** to allow for a more comfortable attendance, with participants spending no more than 3 hours per day in the event.
- **Registration:** think through what information you need to collect during registration and make sure to inform the participants within the registration form who will have access to their information and for which purpose it is being collected (GDPR compliance). Think through whether you want the registration to close before the event, and if so, how long in advance. Set it up accordingly in the platform. Should registration be not needed, consider sharing the open access link without one. Be mindful that registration allows you to estimate how many people will attend the event (in general, approximately 60% of registrants attend).
- **Requirements for participants:** make sure to provide clear instructions on how to join the event to the participants. While choosing the right online platform, think about inclusivity. Not every participant is tech savvy. Many might have institutional restrictions on downloading software. Some participants working from home might have home setting limitations, which need to be taken into consideration when requesting on-camera presence. Choose a tool that allows them to join easily and participate fully regardless of such limitations.

CONTENT

- **Re-think and re-structure** your in-person event to adhere to the same strategic goals when delivered online. Don't just copy what you had envisaged for the in-person event. Start with the strategic goals and needs of the event, not its format. Follow by finding what online options correspond to these needs.
- **Pre/recorded content:** some speakers prefer to pre-record their content in order to practice their presentations, control body language, and easy the overall tension of deliver content online. While this could be a good solution for keynote speakers who can't make it to the event, this might not be ideal should the speaker be one of several. This breaks down the flow of the event and limits interaction with the audience. Additionally, be mindful of whether the platform you have chosen supports pre-recorded content. In situations like the COVID-19 crisis, when most of the world works from home and, therefore, slows down the internet connection, pre-recorded content might present technical difficulties with uploads and streaming.
- **Introductions and ice-breakers:** while your online event is limited in interactive elements and time, it is important to find a way to allow the audience to introduce itself and break the ice for everyone to feel comfortable. This could be done through a quick poll and/or, depending on the size of the audience, more engaging social question exercise.
- **Strategies/activities for engaging the audience:** for workshops and training, engagement is key to effectively teaching a skill and keeping the audience interested. While it presents a particular challenge when delivering events online, certain methodologies/activities can assist you in ensuring engagement:
  - **Polling, voting, quizzes –** these types of activities serve as an effective way to break down a presentation and make people more active, collect information on participants' backgrounds as a way of introducing themselves, as well as getting feedback on the level of expertise in certain areas or that of training/workshop's effectiveness.
  - **Breakouts –** this function in many online platforms provides for a small group discussion scenarios, in which the subjects discussed could be further detailed, questions can arise, people who are not the first ones to ask the questions in the main room are given an opportunity to think, take the time they need and participate. Small group discussions could also be focused on group work with collective problem solving to develop skills and better understand the material through " learning by doing".
  - **Structured Q&A –** instead of simply allocating time after a presentation for an open Q&A and asking whether any of the participants have questions, the moderator could ask what clarifying questions the participants have. This could be done by sharing a collaborative

document where participants can remain anonymous in providing their questions, and give them time (e.g. 5 mins) to think about the material instead of being put on the spot. Not only does it allow for those who are more shy in asking questions right away the time to process, but it also eliminates bias the moderator might have through enforcing anonymity.

- o **Games –** the use of games as a learning tool is as effective online as it is offline. It helps participants retain the information and apply it to problem-solving scenarios.
- o **Contests –** this type of activity works best for long-term training programs and workshops that last several days. Contests are aimed at increasing engagement during and/or after the online sessions, but only work for the competitive participants, so should be used as an addition to the workshop activities, not their essential part.

DEALING WITH DISRUPTION

- ▪ **Prepare for all possible technical challenges, but expect the unexpected to happen**. While all technical issues can usually be solved by testing the platform with different people prior to the event and the soundchecks, there are always individual connectivity issues that occur during the event itself. Often these can only be resolved by the participant, or not at all. Be prepared to deal with such urgent matters as they occur with patience, and be ready to accept that some people will not be able to join.
- ▪ **Trolling**: be ready to deal with unpleasant comments in the chat and/or social media. Trolling happens and the less emotionally and more quickly and professionally you react to it, the less disruptive for the rest of the participants the experience will be. Prepare a plan to deal with trolling in advance.
- ▪ **Hackers**: Online platforms can be susceptible to being hacked or accessed by people that weren't invited. To minimize this risk, distribute the link to the online meeting to signed-up participants rather than posting it directly online. In addition, you can consider setting up a meeting password to enhance security.

ADDITIONAL REFERENCES

Running Meetings and Community Calls

- Yo Yehudi's guidelines how to run regular community calls with Zoom: https://github.com/intermine/community-call-archives/blob/master/community-call-guide.md
- If the link to your community call on zoom is public, this Twitter thread by Alex Miller provides some tips to avoid bad actors compromising the quality of your call: https://twitter.com/alexlmiller/status/1240073789586714626?s=20
- Paul Cannon's advice on configuring Zoom: https://universityofglasgowlibrary.wordpress.com/2020/03/15/tips-for-using-zoom
- DRI blog post on choosing video conferencing software: https://www.dri.ie/blog-videoconferencing
- A Lesson to Demonstrate a Few Techniques for Online Meetings
- Tips for Teaching and Learning Online by The Carpentries Community
- Mozilla online meeting tips
- Coronavirus Tech Handbook
- Gitlab Guide to all remote
- How To Run A Free Online Academic Conference: A Workbook
- TIPS FOR LIVE TEACHING TECH ONLINE, DEEPLY INFORMED BY THE CARPENTRIES
- Carbon neutral conferences: https://hiltner.english.ucsb.edu/index.php/ncnc-guide/

Online Training and Teaching

- Webinar with tips how to run Software Carpentry workshops online https://www.youtube.com/watch?v=MzsJyOkxqv8 -
- Tips for Teaching and Learning Online by the Carpentries community: https://docs.google.com/document/d/1MdmrNn5g2oa2AA6EGYZhyDx-O_YOoH_HqNGsmP6LKIo/edit#heading=h.bns84753wwhw
- Greg Wilson's talk on "Teaching Online at Short Notice": https://docs.google.com/presentation/d/1rE5e2kSFNICNkBJ4iIIgd9eqACi62gxahknKLtw9Hzs/edit#slide=id.g55ddde1eae_0_2

Online Conferences

- Virtual Conferences: A Guide to Best Practices: https://docs.google.com/document/d/1XsGDOHzBhY9S-D4Smp2p9JgqdI0umZ0IZVi7Nhm0gYg/edit?pli=1#heading=h.h6u2gofqx1ej
- A white paper on "A nearly carbon neutral conference" by the UC Santa Barbara https://hiltner.english.ucsb.edu/index.php/ncnc-guide/
- The organisers of the "Librarians Building Momentum for Reproducibility Virtual Conference" are currently drafting a workbook on organising academic online conferences at https://docs.google.com/document/d/1EABkSzEdJk5cmMLETpSbXaeDXmFwcTz7SUXP_C3dN9k/edit#heading=h.gpdz81815lr8
- Organisers of SatuRday Neuchatel have written up a guide for turning their event into an online conference in less than 2 weeks: https://docs.google.com/document/d/1ZXmwVibQKtfCY_HiB49-OhQL-yKhUS9YD9yeMQZH88E/edit#

TOOLS FOR ONLINE ENGAGEMENT

Online sticky notes:
- Google Slides
- Ideaflip

Online surveys:
- EU Survey
- Google Forms
- Lime Survey
- Survey monkey
- Webropol

Virtual whiteboard:
- Google Jamboard
- Open Canvas
- Miro

Polls and quizzes
- Kahoot
- Quizziz
- Slido
- WooClap

Online training exercises
- Stormz

ADDITIONAL RESOURCES FOR SSH TRAINING

FOSTER Open Science Training Handbook

https://www.fosteropenscience.eu/content/open-science-training-handbook

SSHOC Training toolkit

https://sshopencloud.eu/sshoc-train-trainer-toolkit

CLARIN Virtual Language Observatory

https://vlo.clarin.eu/;jsessionid=AEEDF33B3E2E1EADFC530996CAFAE0E0?0