CSCCE

Using virtual events to facilitate community building: Making a PACT for more engaging virtual meetings and events

A framework to guide your virtual event planning

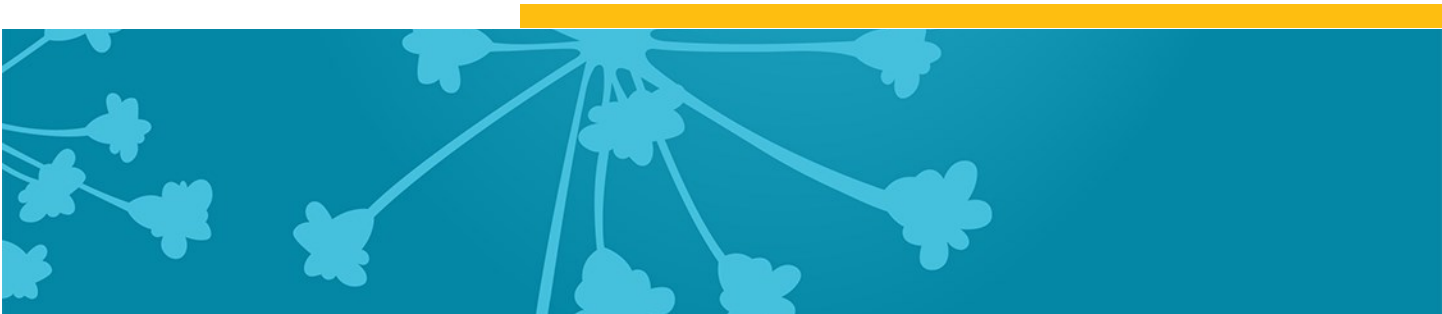Lou Woodley, Katie Pratt, and Jenny East

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About the CSCCE

The Center for Scientific Collaboration and Community Engagement (CSCCE) champions the importance of human infrastructure for effective collaboration in STEM. We provide training and support for the people who make scientific collaborations succeed at scale - and we also research the impact of these emerging roles.

As part of our growing training curriculum, we offer a 90-minute webinar that builds on the PACT framework, digging deeper into the pros and cons of virtual events, how to diagnose what might be going wrong with your events, and how to use the framework to design your next event. Find out more about this webinar, our full training curriculum, as well as our consultancy offerings, on the CSCCE website.

Find out more about us on our website: cscce.org

Acknowledgements

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 - Visualization, Writing - Original draft preparation, Writing - Reviewing and Editing

JENNY EAST - Conceptualization, Writing - Reviewing and Editing

Introduction

With the COVID-19 pandemic and concerns about climate change, as well as a desire to make meetups 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 guidebook - one of a series focused on virtual events - to help you as a community manager, meeting organizer or other convener to host successful meetings that your attendees enjoy. Our emphasis throughout the series 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 series - which we have been sharing in sections - works 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 tools to enhance the meeting experience. See the resources section to view and download the other guidebooks in this series.

This guidebook focuses on the overall event planning process: We outline our PACT framework, which describes four key elements to consider when planning your meeting or event. Should you wish, you can then use the other resources that we've published to dive deeper into each of the elements of the framework, equipped with a clearer overall picture of how they fit together.

We've very much enjoyed hearing how you've used the resources so far and invite you to join us now in making a PACT to design more engaging virtual meetings and events! Let us know how you get on in implementing your PACT by emailing your feedback to info@cscce.org.

Making a PACT: A framework to guide your virtual event planning

Our four-part PACT framework outlines the key elements to consider when planning a virtual meeting or event: **P** for purpose, **A** for attendees, **C** for community management, and **T** for tech tools. For each of the elements, we share three guiding questions, outlined below.

Following the arrows around the model outlined in figure 1, we always start with purpose, then think about who the attendees will be, and from there consider the community management activities and technical tools that will support inclusive engagement.

As each meeting or event is highly context-specific, the framework is intended to help you examine that context and then design an event that works for the attendees. What works in one context, such as using a specific online tool, may not work for participants who are unfamiliar with the technology. The power of making a PACT is in being intentional about meeting design for each event.
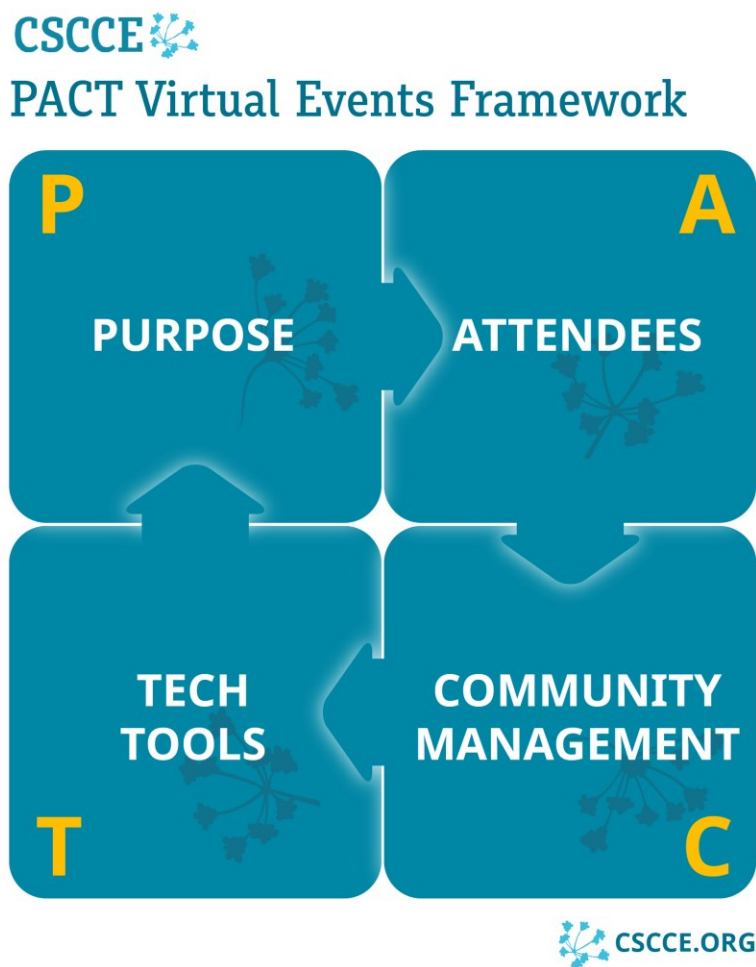

Figure 1
Making a PACT for more engaging virtual meetings and events, a CSCCE framework to help plan online gatherings that are engaging and productive.

P is for Purpose

The first step in designing an engaging event is defining your purpose. Too many meetings don't have a clear goal, or the goal is achieved but the recurring event stays on everyone's calendar even if it no longer has a purpose! Secondly, even if the purpose is obvious to you, brokering a shared understanding with others is vital for a supportive and productive event.

THREE GUIDING QUESTIONS

- **What is the goal of the meeting?** Are you brainstorming or building relationships? Or do you need to make a decision or create something together?

- **What would be the outcome of a successful meeting?** This might look like producing something specific, but it could also involve addressing tensions so that trust is repaired, or building excitement for future interactions.

- **How will you know if you have achieved it?** This may involve more than producing a product. It might help to imagine the interactions that could take place or the emotions that might be felt such as relief, excitement, or a sense of shared resolve. Do you need a survey to find out if you've achieved your goals, especially with respect to including everyone in the room?

You might also pause here to consider whether your goals are achievable in the time you have allotted for your meeting or event, and if not, how you might adjust your purpose to be more realistic. This might look like planning several meetings to address your goals in a stepwise process.

As a general rule, it can be challenging during a relatively short meeting to switch between multiple tasks, e.g., brainstorming, then discussion of ideas, then prioritization, then voting on preferences. While good preparation and strong facilitation can help, sometimes it can be kinder to all involved to build in time outside of the room for reflection and then revisiting or concluding the topic at a second meeting or after a break.

A is for Attendees

With your purpose in mind, now consider who should be at your event and what knowledge, needs, and previous interactions they might have. Bigger isn't always better. What do you need to know about your attendees to ensure that they are able to participate - both from a technical standpoint and also in terms of their relationship to others? These considerations are especially important in a virtual space, where it can be harder to "read the room" or course-correct in the moment, and when large groups are often more challenging to moderate effectively.

THREE GUIDING QUESTIONS

- **Who needs to be in the (virtual) room, and why?** If you're convening a project meeting that has the potential to become too large, the RACI matrix can be useful to determine who needs to be there: Who is **R**esponsible? **A**ccountable? Who is there to be **C**onsulted? Or to be **I**nformed? Those who need to be informed may benefit from an email after the meeting rather than being in attendance, and those who are being consulted may only need to join specific

meetings. With event planning, think carefully about how you will reach beyond the usual attendees and make your virtual space welcoming for all intended participants.

- **How and from where will participants be joining?** Do you need to consider elements such as the time zones participants will join from, if they have limited access to internet bandwidth, or if they will be attending by phone? What plans do you have to support those who would benefit from the use of subtitles, screen reader compatibility, or other accessibility options?

- **Are there power imbalances to work against?** Does everyone know each other or will you need to budget time for introductions? Could there be authority figures in the virtual room that may dominate the conversation? Do you have a code of conduct that you refer to at the beginning of the event (and in any virtual notes documentation) that sets expectations about acceptable behavior?

It might be helpful to also clarify who *does not* need to be at the meeting or event, not only in the interest of respecting everyone's time, but also to support the inclusion of diverse voices and their ability to contribute in a manner that protects their safety. While it can be tempting to invite everyone with a tangential interest or stake, or to make an event as large as possible to demonstrate its success, packing your meeting could be detrimental to your purpose and inhibit participation due to a lack of clarity about who else it there and concerns about speaking up in unfamiliar spaces.

C is for Community management

Now you know why you're meeting, and who is attending your event, you can turn your attention to how you will engage everyone in the virtual space - what CSCCE calls the community management aspect of the experience. This is about all aspects of facilitation, including before and after the event. Keep in mind the constraints of the virtual space, and note here any considerations that might be addressed with tech tools (see the next section).

THREE GUIDING QUESTIONS

- **How long does your meeting need to be?** If you are not constrained by a predetermined time frame (such as a regular hour-long weekly project team meeting), carefully consider the ideal length for the event. Could you get everything done in 30 minutes? Or do you need half a day with breaks built in? Knowing your purpose and attendees will help you to think this through.

- **How will you keep your attendees focused and engaged?** What documents do you need to create (e.g., agendas, virtual notes docs, visual aids)? Is there anything you need to send your participants ahead of time (aside from an invitation to join!)? Will you switch up activities and pace during the meeting?

- **How can you support participation while sticking to the purpose of the meeting?** What will you do if you diverge from the topics and timings on the agenda? Who is the chair of the meeting and responsible for guiding and signposting the meeting's progression? How will you make use of the chat function in your video conferencing platform (or will you disable it)?

Consider how you will follow up after the event, perhaps with a thank you note or sharing additional resources. If the event is part of a series, you might also promote the next event, sharing details so participants can plan ahead.

T is for Tech tools

Gathering online comes with the opportunity to use novel tech tools and communication methods. Integrating such tools into your meeting should be intentional, and actively serve your purpose or goals, as well as being appropriate and accessible to the attendees you're working with. Don't forget: When using any tools, take care to check the sharing settings ahead of time and give a very short demonstration when you start using the tool so that everyone understands how they can participate.

THREE GUIDING QUESTIONS

- **Are there activities you are planning in service of your meeting goal that could be facilitated or enhanced by using additional tech tools?** Do you need a virtual whiteboard for brainstorming, or an anonymous polling platform to collect votes?

- **Will the tools help everyone in the meeting?** How easy are they to use? Will participants calling into the meeting be excluded? Are the tools available only on certain web browsers or in certain parts of the world?

- **Are you making things too complicated?** Could you achieve your goals using the capabilities of your meeting platform? Do you have a simple back up plan that still respects the goal of the activity, if the tool doesn't work out?

Try to avoid using more than one additional tech tool, unless you know that your participants are already very familiar with using the tools (you may use a pre-event survey to determine levels of comfort with specific technologies, as CSCCE does for all of our online courses). Also, make sure that the host/facilitator knows how the tool works, which might involve you getting more familiar with the tool's use or offering a training session ahead of the meeting to support colleagues.

Resources

Webinar and consultancy

CSCCE offers a 90-minute webinar on this framework, which goes deeper into the diagnosis of common issues as well as case studies on applying the PACT to different types of virtual events. Webinar participants are also invited to bring questions about their own use cases, or follow up with CSCCE staff as part of our consultancy offerings. Please contact info@cscce.org for additional information.

Additional sections of this guidebook series

The other sections of this guidebook series will help you with various aspects of planning your events, all of which can be downloaded for free from our resource repository:

A guide to using virtual events to facilitate community building: Selecting and testing online tools. Woodley and Pratt doi: 10.5281/zenodo.4521211

This section outlines five steps to assist your assessment of virtual tools to supplement online meetings and events. We walk you through the process; defining the goals or use case first and then finding the right tool to meet your needs.

A guide to using virtual events to facilitate community building: Event formats. Woodley, Pratt, Ainsworth, Amsen, Bakker, Butland, O'Donnell, Penfold, Pope, Quigley, and Tsang doi: 10.5281/zenodo.3934385

This section contains 12 "recipes" for virtual events that are designed to engage and build community in STEM. It contains everything from hosting small group icebreakers to planning multi-day conferences.

A guide to using virtual events to facilitate community building: Curated resources. Woodley, Pratt, Ainsworth, Bakker, Bennett-Lovell, Bertipaglia, Butland, Guay, Karvovskaya, Lescak, Meier, McLean, Santistevan, Timm, and Vasko doi: 10.5281/zenodo.4270106

In this section we focus on curating links to useful resources about virtual events - including case studies of conferences and trainings that moved online at short notice.

CSCCE tip sheets

We have also created tip sheets that are useful for anyone convening online meetings and events:

CSCCE Tech Tip Sheet - Zoom bombing: How to deal with bad actors during Zoom events. Pratt and Woodley doi: 10.5281/zenodo.4645429

This tech tip sheet is intended to support you in scenario planning so that you feel well prepared to

address any disruptions caused by a Zoom bomber. In it, we go over a checklist of things to do before, during, and after your event to help you and your events team prepare for such an eventuality and to minimize any harm it might cause.

DEI Tip Sheet: Captioning, subtitles, and transcription for online meetings and events. Pratt, Santistevan, Woodley, Butland, Gould van Praag doi: 10.5281/zenodo.4268671

In this tip sheet, we offer some solutions for creating captions, subtitles, and transcripts to improve accessibility of your online settings and events. We also offer some points for further consideration as you decide upon a solution that works for you.

Additional resources

In collaboration with members of our community of practice, we host semi-regular "Tools Trials" to test out virtual platforms. You can read recaps of these trials on the CSCCE blog.

For general resources related to community management in STEM, visit the CSCCE resources pages on our website.