

DESIGNING A VIRTUAL EVENT



CONFERENCE &
EVENT SERVICES

SONOMA STATE UNIVERSITY



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Virtual Events Guide

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Designing a Webinar or Conference

Types of Virtual Events

While hosting a webinar or virtual conference is very different from an in-person event, it is a challenge that any planner can confidently tackle if they take the proper steps in planning and organizing. Below are some of the key areas to consider when designing your virtual event.

Not all virtual events are created equally. You have a variety of options at your disposal, and each has its own benefits and challenges. You should choose your format based on the specific goals and objectives of your event.

Did you get your license?

To host a Zoom Webinar you will need a webinar license. Check in with your department or advisor to see if you already have one, or contact the CES Office at reservations@sonoma.edu to schedule a time slot on ours!

Completely Live

A completely live event means all presenters and attendees are tuning in to the same live feed. This format may feel the most similar to a typical in-person event since everyone is experiencing it simultaneously.

Benefits

Depending on your settings, attendees can interact with each other and the host team via the chat and Q&A features, increasing feelings of connectedness and options for networking among attendees. Since the event is live, the most current and up-to-date information can be shared.

Challenges

Technical issues can cause delays from the host team, or prevent individuals from attending. If attendance exceeds 1,000 people, you will need to consider a platform other than Zoom to host your event on. Some examples are [OnAir by Events Air](#) and [Meetingplay](#). Note that while these are great alternative resources, they do involve approval from IT, and incur additional operating costs, which you should consider before using.



Only go live when there is a need to go live based on your event's goals and objectives. If some or all of these can be met without being live, consider using pre-recorded content.

We'll talk more about this kind of content on the following pages!

Types of Virtual Events continued

Semi-Live or Modified Live

Semi-Live or Modified Live involves pre-recording a portion of the event, and then seamlessly switches between live and pre-recorded content throughout the event. Pre-recorded content may include keynote addresses, presenter speeches or any content that does not have an interactive component. You can share recorded content from a host or presenter role through [Screen Sharing](#).

Benefits

If done well, attendees may not realize they are watching pre-recorded content. Because you are able to do as many takes as needed and apply video editing as needed, speaker mistakes or host errors can be easily avoided or cut out entirely. It is also easier to build in accessibility features such as closed captioning. An additional benefit of this format is that you retain the interactive capabilities of a live event.

Challenges

Can be difficult to make the event feel cohesive, however, you can make the transition between sessions feel more seamless by having all presenters, speakers, and panelists wear the same outfit in both the live broadcast and recorded content. You also run the risk of technical difficulties during the live portions of the event.



Types of Virtual Events continued

Fully Pre-Recorded

If there is no need for an interactive portion, or any other live component, in your event based on your goals and objectives, a fully pre-recorded event is a great option.

Benefits

This format allows for complete control of content as you can re-shoot as many times as needed to get it right. It is also great for large audiences, and especially those across time zones, as sessions can be offered multiple times with peace of mind that all attendees will receive the same content. It is also easier to build in accessibility features, such as closed captioning, ahead of time.

Challenges

Because the event is pre-recorded, you will not be able to respond live to attendees' questions and there will not be opportunities for engagement from the audience.



Hybrid

A hybrid format allows you to provide the "best of both worlds". A portion of your attendees will be in person, while the remainder tune in via a live broadcast or recording. In a world of physical distancing, this gives you the ability to still reach a large audience while restricting the number who attend in person.

Benefits

More options for attendance can mean greater attendance overall, and gives attendees from out of the local area the ability to still attend the event without the cost and hassle of travel.

Challenges

As with any streaming service, you will need to be prepared to mitigate in the event of technical difficulties or failure. Because you are essentially running two simultaneous events, you will need two event plans and appropriate contingency plans for each.

Event Design

Design your event with the attendee experience in mind. Just like an in-person event, your attendees should feel welcomed, engaged, and valued throughout the event. And, if your event includes sponsorships, make sure the sponsors feel valued as well. Below are some strategies to elevate your virtual event experience.

Create a Production Schedule

No matter the type of virtual event you choose, you should have a clear and defined plan for the event that supports your overall goals.

Identify speakers and presenters who will bring value to your event, and make sure their content is interesting and engaging. If your event has multiple speakers, assign a specific schedule that includes both timing and queues so they can be prepared for their turn to go live. This can also include scripts, which allows the speakers to follow along and know when the previous speaker is getting close to the end of their presentation.



Announce break times at the beginning in the webinar to avoid folks dropping off to take breaks on their own.

When developing your event schedule, include pre-event time for the hosting team to connect and get set up prior to the official event start time. Zoom allows you to open the webinar to panelists first while attendees are in the Waiting Room through the [Practice Session feature](#). Plan enough time to allow for a tech check and any necessary adjustments to be made. Depending on your events timeline and format, you may alternatively choose to set up a [Breakout Room](#) for presenters to use as a "Green Room" throughout the event. In addition, make sure your schedule includes breaks, breakout session times, Q&A, and closing sessions (as they apply to your program).

Follow-Up & Evaluate the Event

After the conclusion of the event, send out a thank you and short survey link to all registered attendees for feedback on your program. You may also include a link to the webinar recording (if recorded) and any available slides. Use the evaluation to get feedback on areas in which you can improve. Some questions to include are:

- Did you encounter any difficulty accessing the event?
- How would you rate your overall experience?
- Agree/Disagree: "I was able to easily navigate between sessions"
- Did the session description accurately describe the topics discussed today?
- What topics are you interested in for future webinars?

[Google forms](#), [Qualtrics](#), and [Survey Monkey](#) are a few options for designing your evaluation.



Asking your survey questions in a poll at the end of the webinar increases the response rate!

Roles in a Virtual Event

The roles outlined below can be adjusted depending on the size and scope of your event. For smaller events, one person may fulfill the duties of more than one role, keeping in mind all tasks should be accounted for and assigned to someone.

1

Virtual Stage Manager

- Assigned to Zoom "Host" function, but role is mainly behind the scenes
- Controls main screen graphics and screen share
- Controls mute, unmute, and spotlight of participants
- Monitors time, uses direct chat function to communicate with panelists
- Has copy of all presenters' slides ready to share
- Sets up back-channel communication
- If recording event, manages recording

2

Master of Ceremony (MC)

- Event "Host" seen by viewers
- Covers welcome announcements, ground rules, panelist introductions, breaks, and fills air time as needed (consider scripting ahead of time!)
- Has copy of basic event graphics in case stage manager cuts out
- Verbalizes transitions for a smooth flow
- Consider having more than one for larger events
- Included in back-channel communication

3

Presenters & Panelists

- Assigned to co-host or panelist status in Zoom
- Has the ability to view and send video, share screen, and annotate
- Should be included in back-channel communication

4

Chat Moderator

- Event co-host
- Oversees the chat and Q&A boxes, makes list of pertinent questions
- Responds to messages in chat on behalf of host
- Keeps eye on chat for inappropriate comments, can flag or remove attendees as needed
- Watches for rogue, un-muted attendees and mutes them as needed
- Included in back-channel communication



Don't forget to rehearse!

Set up time for a rehearsal three to five days prior to your live broadcast so you can test all presenters' cameras, microphones, and presentations in a risk-free environment and have time to troubleshoot. You may discover that presenters need to make adjustments to their computer settings, location, presentation, or even find that they do not have the proper access to the webinar platform.

Roles in a Virtual Event continued

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Spotter

- Registers and attends as an attendee (like a secret shopper)
- Included on back-channel communication
- Alerts stage manager or tech support to any technical issues from attendee's perspective
- Can be added as co-host to support stage manager, MC, or other role as needed
- Monitors chat for inappropriate comments, and alerts Moderator as needed

6

Tech Support

- Team member designated for webinar support (like the "Information Booth" of virtual event)
- Provide email address for this individual as part of the registration confirmation
- Identify them as the person to contact for support during the event for meeting passcodes, help finding virtual breakout sessions, etc.
- Responds to messages in chat to attendees experiencing technical difficulties

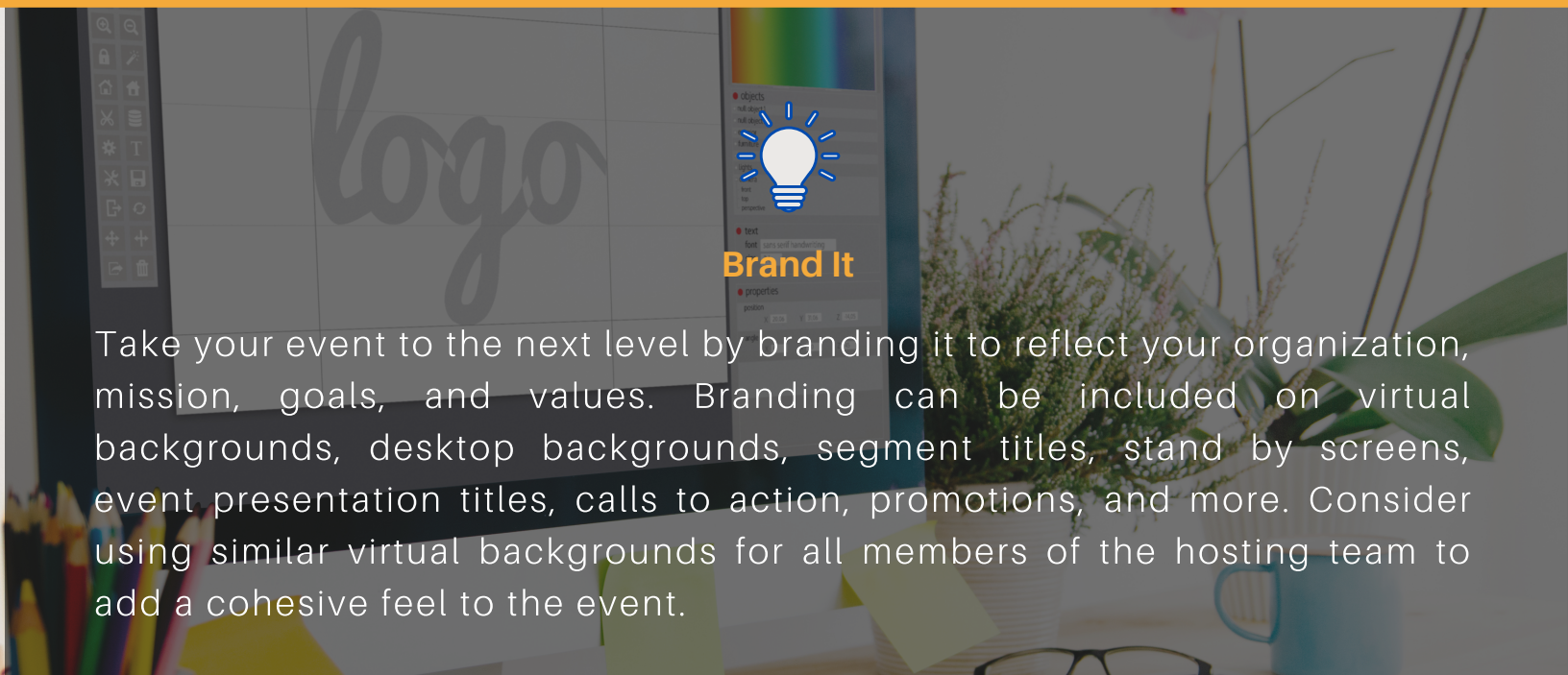
For more information on how to assign roles in Zoom and a comparison of what each role offers, check out this [article](#) about roles in a Zoom webinar!



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Registration & Marketing Lead

- Responsible for sending out link to register prior to event
- Promotes event to target audiences
- Assigns and monitors registration fees (if applicable)
- Send reminders to registered attendees leading up to event



Take your event to the next level by branding it to reflect your organization, mission, goals, and values. Branding can be included on virtual backgrounds, desktop backgrounds, segment titles, stand by screens, event presentation titles, calls to action, promotions, and more. Consider using similar virtual backgrounds for all members of the hosting team to add a cohesive feel to the event.

Leading a Virtual Event

Dare to Think Differently!

Virtual meetings & events are different than in-person, and as such, you must accept and appreciate the differences. If you try to approach your virtual meeting the same as its traditional counterpart, you will be disappointed by the outcome. However, with proper planning and slight adjustments, your event can be just as successful conducted virtually.

Share the Game Plan



Getting information to attendees early will give them an idea of what to expect and prepare for, increasing their commitment to and engagement during the meeting. Send out the agenda or program, as well as any info for other apps or platforms that may be used during the meeting, so that they can install and familiarize themselves with those ahead of time.



For events with networking, ask attendees to update screen name to include their title and/or organization

Keep Everyone Engaged

The average human's attention span is only eight seconds. When it comes to a virtual meeting, you are competing with so many other distractions (kids, emails, delivery man, etc.) that a few seconds is all it takes for you to lose the audience's attention. Consider implementing any or all of the following tactics to create more engaging virtual meetings:



Implement a variety of methods in delivering information (ie. powerpoint slides, videos, graphs)



In a recurring meeting, mix up your roles by rotating who presents or shares each week



Use the [Polling feature on Zoom](#) to get real-time feedback from the group



[Kahoot](#) and [Mentimeter](#) are other fan-favorites for conducting real-time polling and gamification



Do a round of prompted questions where the moderator asks attendees to share with the group

Set the Ground Rules

The first order of business when starting the meeting should be to establish the ground rules and expectations. As the host, you should take this time to welcome your attendees and set the meeting guidelines. Some examples you may choose to implement:

Host mutes all guests except the meeting leader as the default setting, the host can (or give permission to) unmute guests to ask a question or make a comment

Ask attendees to use the **"raise hand"** icon to indicate they would like to speak. [Note - you will need to turn on the ["Nonverbal Feedback" feature on Zoom](#) to enable the "raise hand" and other reactionary icons in the meeting settings]

Reiterate the agenda for the meeting and specify what time will be dedicated to presentations and information versus questions and discussion.



For additional suggestions on leading more engaging meetings, check out this [list from Cvent](#)

Leading a Virtual Event continued

The Host Will See You Now

Zoom's Waiting Room can be a useful tool for managing your meeting attendees, while also adding customization and an additional level of security to your meeting.

Use the Waiting Room as a placeholder for attendees prior to the start of your program. You can customize this space to provide more information about your organization or meeting topic. Once attendees are in the Waiting Room, the host will need to admit them to the actual meeting. As the host, you have the option to "Admit All" or admit attendees individually. This can be a good security check to ensure your meeting doesn't fall victim to a "Zoom-bomber" or other unwelcome guest.

For more information and guidance on the Waiting Room, check out [this article](#).



Share & Collaborate in Real Time

You may not be in the same room (or building, or even town), but Zoom makes it easy to feel like you are. Use the [Screen Sharing feature](#) to share presentations, documents, photos, or "how to's".

If you are looking for a more collaborative option (ie. brainstorm session, team development, etc.) click on the [Whiteboard](#) option after selecting Share Screen. In this mode, your team can collaborate on a single shared screen in real time. [Note - Each attendee will need to have [annotations enabled](#) for the meeting]



Open the content you'd like to share on a separate browser so attendees can't see other tabs you may have open.

Accessibility

As events have needed to transition to virtual platforms, organizations have been proactive in reaching their attendees through webinars, virtual classes and tours, or other meeting programs. As an organization, it is important to remember that these valuable resources remain accessible to those who need accommodations. Below are some helpful tips for keeping your virtual event accessible and inclusive to all attendees.



Communication tips:



Make sure to have your contact information available on the registration page so guests can request accommodations if needed



Include accommodation questions in your registration questions



You can also include accessibility symbols on your agenda or registration site. This will show accommodations that are already offered, such as captioning

Note: Symbols are not detected by screen readers. Symbols can be included, but never in lieu of text. Be sure to list any accommodations offered.



All registration deadlines should be the same whether an attendee is requesting an accommodation or not. It is important to make sure that your registration deadline matches your deadline to request accommodations. This will provide a consistent experience to all attendees and avoid potential confusion

Additional Items to Consider

- Is the platform accessible for a person who uses screen-reading software?
- Are videos and images audio-described?
- Are presenters ensuring all their visual material is accessible for attendees?
- Is there a convenient way for attendees to request accommodations when registering for the event? During the event?

Virtual Platform Spotlight: Zoom



This program, like many others, offers a variety of accessibility features. You can view all the ways Zoom provides easy access to guests on their [accessibility site](#).

Zoom allows you to assign a presenter or moderator to live type closed captioning. The directions for this feature can be found [here](#).

Third party software live captioning Communication access real-time translation (CART) is also available through zoom.

Accessibility continued

Disability Services for Students

Students on campus needing any virtual accommodations are encouraged to contact Disability Services for Students (DSS). This department will be able to connect current, and future students, with the appropriate accommodations needed for attending a virtual event.

Students attending, or planning an event, and wish to have the necessary accommodations should make a request to DSS 10 business days prior to the event.

It is also important for students on campus to review the rights and responsibilities they have when requesting accommodations.

DSS Contact

General Questions
disability.services@sonoma.edu

For individual staff
please click [here](#).



Campus Accessibility Contact

Brad Starkey-Owens
Accessibility Services Analyst
Information Technology
starkeyowe@sonoma.edu

Accessibility Center

Student Organizations or Departments on campus seeking information on how to make their documents, presentations, or websites more accessible during their virtual events are encouraged to visit Sonoma State's Accessibility website.

On this site you can find [demo videos](#) on how to make your Word documents and Google docs accessible for screen readers.

VIRTUAL EVENTS

Tips for Hosts and Presenters

DO A TECH CHECK



- Make sure your devices, Zoom software, and plugins are up to date prior to the event. You do not want to cause an event delay waiting for an update.
- Shut down and restart your device the morning of or night prior to the event so that your machine is not "tired". It is wise to have a backup device available too, just in case.

GIVE YOUR ATTENDEES A BREAK



- Keep your speakers on a schedule, and whenever possible, limit individual presentations to 30 minutes or less. An hour-long keynote address may be a staple of most events, but when it's watched from a computer screen, it can feel mentally taxing and lose its impact.
- If your event is over one hour long, make sure to schedule breaks to give everyone a chance to stretch and step away from the computer.
- Instead of shuffling your attendees in and out of the "Waiting Room" during breaks, consider creating a video or photo loop to play instead. You can add a timer to the loop to let attendees know when the live broadcast will return.
 - *BONUS! If you have sponsors for your event, this is an excellent opportunity for sponsor recognition!*

LIMIT WIFI USE



- Use a wired ethernet connection for the most secure internet access. If you must use wifi, position yourself near the router, disconnect as many unused devices from your network as possible (Smart TVs, iPads, Google Home, Amazon Echo, etc.), and ask the other members of your household to refrain from using wifi during the event.
- If calling via phone for your audio, disconnect wifi-calling from your phone. This way your audio is not dependent on your internet connection.

SOUND YOUR BEST

- Use an external microphone if possible. Headphones with an in-line microphone or an external mic (such as a podcast mic) and separate headphones will provide better sound quality. Laptop mics should be used as a last resort as they pick up extra noise.
 - *Be careful when using headphone mics! If the microphone hits at your chest it will pick up noise and feedback from any movements you make.*
- If you have the budget, consider hiring an event production company to produce the event. They will have access to the cameras, microphones, and technology to take your production from "home movie" to studio quality.



MORE TIPS



BE CAMERA READY

- Set yourself up in a space with good lighting - natural lighting is best. The light source should be in front of you.
- Avoid windows as your background as this will cause you to look like a shadow figure on the video feed. Consider purchasing an LED Ring Light to create the lighting you need.
- Your background should be not be busy or distracting. A wall with a bookshelf, photos or art is best. Consider using a virtual Zoom background. Avoid wearing green clothing if using a virtual background.
- Make sure the camera lens is clean!
- Place the camera at eye level or above, with yourself centered horizontally on the screen, and line up your eyes at the top third of the screen.
- Look at the iris of the camera, this will make it seem like you are talking to the attendees. If needed, put a small happy face or picture just above your webcam to focus on.

THINK OUTSIDE THE BOX

- Use all of the host features to your advantage. For example, you can toggle on and off the main camera feed and microphone. Use this to share the host's reactions to content shared by a presenter, or to hide their feed and sound if they need a stretch or bathroom break.
- If you have charged attendees a fee to attend the event, make sure you maintain the value of exclusivity. You can share recordings or presentations to those who have registered post-event, but do not publish them in a place where they can be freely accessed by anyone (ie. your website or YouTube).



DON'T OVERSHARE

- Have your screen share content open and ready to present before the program begins.
- Whenever possible, share only the window, document, or image you want to showcase. If sharing your desktop, make sure the background is appropriate or event branded. Use dual monitors when possible, to give you ample space for all your presentation needs.
- Close or hide email windows, anything with sensitive information, extra applications or browser tabs, and turn off on-screen notifications and messenger services.

LASTLY

IF Q&A STARTS TO FEEL LIKE AN INTERROGATION



- If your Q&A chat is overflowing and you are tight on time, do not fret! You have options:
- Have your moderator keep an eye out for FAQs, and answer those live.
- Delegate others on your team to respond to questions directly in the chat.
- For questions you do not get to during the live broadcast, record a separate session post-event which you record questions and answers and email out to attendees.

HAVE BACK UP

- Have a team of co-hosts so that the portal doesn't close if the main host experiences a drop in connection or other technical failure. Furthermore, every member of the hosting team should have a copy of every presentation saved on their device. This will allow you to make a smooth transition should any host or presenter drop off the connection.
- Utilize some form of back-channel communication, such as Group texts, Slack Channels, or instant messenger apps, where your team can connect outside the meeting portal. If the speaker is different from the person operating the presentation, use this back-channel to communicate when to advance slides.



PREPARE CONTINGENCY PLANS



- Despite your best efforts in preparation, technical difficulties may be unavoidable. However, having a plan in case these come up will keep you in control and the event running smoothly.
- Create a plan to fill time during a technical difficulty (aka Vamping). This can include: banter between hosts, questions from the audience, trivia, a break for a sponsored message, or skipping ahead in the program. [Note - if you do skip ahead, make sure you explain to your attendees that you are deviating from the schedule]

THE ULTIMATE FAIL-SAFE



- Depending on the nature of the event, it may be worth your while to fully record a version of the event ahead of time. This way even in the face of total catastrophe, you can email the content to your attendees so they can watch it immediately. They have already set aside the time to participate and you want to respect that.