

Virtual Conferences: A Retrospective Guide

Sarah (Sadie) Warren
Technology Coordinator
June 2021

Welcome, reader! This is a preliminary draft outlining, from a “tech perspective,” the logistics of Philosophers for Sustainability’s first ever virtual conference: Philosophy & The Climate Crisis. This three-day Zoom conference ran from June 10-12, 2021, but this document is an effort to preserve an operational record so that its insights might outlast it—facilitating future iterations of the virtual conference structure for those new to virtual event-planning.

The Team

Philosophy & The Climate Crisis was organized by two Organizers (Eugene Chislenko and Simona Capisani), who recruited a Technology Coordinator (Sarah Warren) to help with technological and technology-adjacent conference needs. While the Organizers were responsible for the “vision” and administration of the conference, determining how that vision and administration looks and is practically achieved in a virtual context requires a fair amount of back-and-forth with the Technology Coordinator, so these three roles intersected quite frequently. Aside from this, a small team of Technology Volunteers were recruited from the conference participant membership and given some training to help manage day-of demands.

Major Takeaways

- Organizers will be inundated with unanticipated social and administrative demands—having a **dedicated technology lead** (Technology Coordinator) to handle “venue-related” logistics prevents competing demands and unnecessary stress
- The Technology Coordinator will be juggling a variety of technology tasks and unanticipated demands, so having built-in redundancies in the form of **overflow technology support** (Technology Volunteers) is very useful
- **Training** these volunteers is key—often the difference between being helpful and being a further responsibility depends on software familiarity—and screencapture training videos outlining software features and common problems/ how to resolve them ensures that synchronous meetings aren’t necessary

The Tech

A variety of technologies were used throughout conference planning, day-of events, and post-conference projects. Pre- and post-conference technologies are listed beside various tasks under the heading The Tasks (below). Day-of technologies are listed here. The goal was to have a reasonably low threshold of technological literacy/sophistication necessary for robust participation in all integral conference proceedings, with assistance and resources made available to those who needed them, but with additional possibilities and features made available for those comfortable with exploring further.

Day-Of

- Zoom—one continuous non-webinar session per day with informative transition slides and audio DJing between sessions and permanent thematic “lounges” via named breakout rooms
- Discord—after-hours, unmoderated social space with text chat, audio, and video options
 - Alternative: Spatial Chat—costly *but* more atmospheric, interactive, multimedia-friendly
- Padlet—textual and visual introductions for participants

Major Takeaways

- Thinking about the **technology load** is helpful—we sometimes forget how much knowledge, training, and experience goes into being able to navigate virtual spaces, and keeping track of the demands that are being placed on participants who comes from different backgrounds may aid in understanding how much complexity can be built into proceedings while remaining inclusive
- Don't underestimate the **cumulative burden of moving parts**—many simple tasks can be overwhelming and lead to mistakes, and reducing the number of moving parts (to a degree) can make things run more smoothly (such as keeping a session open rather than opening and closing repeatedly throughout the conference day)
- **Promote strategically**—some technologies will need to be identified in advance (e.g. Zoom); some can be incorporated on the fly within the session because they are intuitive to use (e.g. Padlet); some can be incorporated on the fly because they are likely to attract advanced users and they are not critical to the conference infrastructure (e.g. Discord)

The Tasks

The below list is not exhaustive, but covers many of the most important technology and technology-adjacent duties that arose throughout the conference process (planning, day-of, post-conference).

Technology Coordinator

Planning

- Poster design (Canva, PDF)
 - Note: aim for visual consistency (e.g. colour, fonts, style) for not only elegance, but participant recognition of official documents and spaces
 - This applies to all participant-facing documents and images
- Zoom background design (Photoshop or GIMP, JPG)
 - Note: blurred backgrounds can offer imagery and interest without distraction; logos can be added using transparent layers
- Transition slide design (PowerPoint, PPT)
 - Note: indication of upcoming session, session title, session time (including time zone), and timely instructions are good text items to include
- Division and coordination of volunteer labour (email, on-the-fly editable Google doc)
 - Note: email schedule and confirm interest well in advance
- Zoom training for Technology Volunteers (Audacity/Screencast-O-Matic/Premiere Pro or OpenShot, MP4)
 - Note: writing a script > getting it approved > recording audio > recording screencapture video > combining in editing software is best for a concise and error-free end product
- Granular itinerary of duties (on-the-fly editable Google doc)
 - Note: this is perhaps *the most important document*—having Organizers and Technology Coordinator compile a *very* detailed timed table of duties (with columns for each person) and performing a dress rehearsal will pay dividends: have this open at all times during conference days
- Zoom settings (Zoom web portal, Zoom session)

- Note: reviewing both the web portal settings and the Zoom session settings prior to the conference and knowing which session settings will need to be changed when is key
- Consent form (Google form)
 - Note: for recording—can be distributed easily via link in the Green Room (breakout room)
- Feedback form (Google form)
 - Note: keep it short; avoid double-questions and ambiguity; think hard about what information you need to collect or will help you improve future events
- Social space selection and set-up (Discord)
 - Note: remember to provide instructions (via email or in-session chat); uploading profile images with a logo looks elegant and reassures participants that they are in the right space

Day-Of

- Zoom hosting (Zoom)
 - Note: review which powers are granted to cohosts; be aware that connection issues may transfer hosting to a cohost, and warn cohosts accordingly
- In-session logistics (Zoom)—dynamic changes for cohosting, session permissions, spotlighting, general technical assistance, volunteer assistance, preventative muting, manual breakout room relocation, recording, saving session chat log
 - Note: this is quite a lot of material to work through in advance, so be sure to identify these roles in your itinerary of duties (and don't double-book anyone with simultaneous duties); beginning the session 30 minutes early and having a meeting with Organizers and Technology Coordinator is a good idea to check in
- Between-session logistics (Zoom)—transition slides and audio DJing
 - Note: having a second Zoom account (using a second computer) with a clear name and profile image (e.g. Sound & Vision) is very helpful for multi-tasking; transition slides can be shared directly through the Advanced tab (no PowerPoint interface clutter); delete old transition slides as they are used to immediately share the correct slide; check “Share computer audio” to simultaneously DJ; have a ready-to-use list of music (including links); be careful not to play ads when DJing; long playlists are much easier to use than multiple songs; song requests may need to be compiled in advance
- Emergent items document (on-the-fly editable Google doc)

- Note: have a collaborative document to quickly and concisely communicate or remember needs; have this open at all times during conference days
- Organizer/Technology Coordinator live chat (WhatsApp)
 - Note: having immediate, private communication outside of Zoom prevents accidentally sharing private/administrative discussion and is easier to keep track of than direct messaging in Zoom
- Screenshot images
 - Note: a visual record can be great for sharing; be sure to get permission from participants unless it is on speaker view (then you only need permission from speakers) or blur out participants
- Social media promotion
 - Note: create an official hashtag; make sure login info has been appropriately shared; encourage participants to use hashtag on social media

Post-Conference

- Chat editing for privacy (Notepad)
 - Note: delete private messages; a second Zoom account (e.g. Sound & Vision) will have fewer of these
- Video editing (Premiere Pro or OpenShot, MP4)
 - Note: manually turning recording on and off will eliminate time-consuming editing later
- Closed captioning (Notepad, WordPress)
 - Note: enabling live transcripts increases accessibility and removes the necessity of manually transcribing
- Volunteer thank you emails
 - They put in time and effort!

Technology Volunteers

- Assistant Chairs: meet Speaker(s) and Chair(s) in Green Room (breakout room) 15 minutes prior to session start to discuss best practices, timing, signals; preventative muting (overflow support); reiterating process for and keeping an eye on Q&A queue (in case of Chair omission)

- Note: including volunteer shifts in the itinerary of duties is helpful; greet and provide preferred contact method at the beginning of the shift via direct message; changing Zoom display name to “ASSISTANT CHAIR | [name]” helps with visibility; Q&A can be taken via raise hand reaction (ordered list appears via Participants panel) and chat keywords (e.g. “QUESTION [question content])
- Tech Assistants: general ad hoc technical support for participants
 - Note: including volunteer shifts in the itinerary of duties is helpful; greet and provide preferred contact method at the beginning of the shift via direct message; changing Zoom display name to “TECH SUPPORT | [name]” helps with visibility; asking volunteers to change their names if they are comfortable helping out eases labour burden

Organizers (Tech-Adjacent)

- Boilerplate messages (Zoom chat)
 - Note: beginning sessions with basic template messages for newcomers/reminders keeps participants informed (e.g. chat norms, Q&A norms and processes, display name requests, including pronouns)
- Holding space in pre- and post-session hangouts/named breakout room lounges (Zoom)
 - Note: pre- and post-session hangouts in the main room give participants a way to get to know each other more informally; having named breakout rooms for people to relocate can foster intimacy and ways of pursuing different types of conversation; support these spaces by occupying them; good places for alternate/informal Zoom backgrounds (e.g. diner background for breakfast hangouts)

Major Takeaways

- **Clarity with redundancy**—it is crucial that everyone has explicitly been made aware of their duties (large and small) and thought about what that procedurally entails, but this includes contingency plans for when unanticipated issues arise (e.g. “I will spotlight speakers, but if I need to step out, I will communicate this via WhatsApp and x will step in”)
- **Shift work**—these redundancies work especially well if Organizers arrange for shifts where they will be responsible for redundancy measures

- **Obvious mic-passing/“signposting”**—in order to facilitate keeping track of timing for tasks (especially recording), having speakers clearly “pass the mic” and indicate new stages of the proceedings is very helpful (e.g. “I will now pass the mic to *x* to proceed to the Q&A period of the presentation”)
- **Details in the emails**—make sure that participants can search for important resources (e.g. tech FAQ and tutorials) in well-titled emails

Zoom Settings

Day-of events can look quite different depending on what settings are selected both before and during the conference—and some of them can't be changed unless the session is closed and re-opened (not something that you want to do!). These are what worked for us (and why we chose them).

Note that these are not *all* of the settings available to you in Zoom, but rather the most directly relevant and important. It is a good idea to spend some time exploring both the Zoom web portal settings and the Zoom session settings in order to familiarize yourself with various features and how they may help or hinder your specific conference activities.

Zoom Web Portal Settings

These settings are selected by the host prior to the meeting, and can only be changed by closing the session, changing the settings, and re-opening the session. They do not shift according to who is host at any particular time throughout the session, but rather are static, dictated by the settings chosen by the host who scheduled the meeting.

Meeting

Security

Waiting Room: off

- Unnecessary variable

Require a passcode: on

- Security measure; can be embedded in one-click join link

Embed passcode in invite link for one-click join: on

- See above

Only authenticated users can join meetings: off

- May cause complications for out-of-network participants

If Waiting Room is not enabled, phone dial-in only users will: Be allowed to join the meeting

- Facilitates joining for folks who do not have internet access or who lose connectivity

Schedule Meeting

Host video: on

- Encouraging video presence is easier when the host is present (but can be manually turned on if pre-conference in-session briefing needs to happen)

Participants video: on

- Encourages video presence but can be turned off for those who are uncomfortable with video or have a bad connection

Audio type: Telephone and Computer Audio

- Facilitates joining for folks who do not have internet access or who lose connectivity

Allow participants to join before host: off

- Prevents confusion of participants arriving before the host (especially relevant if time zones may be an issue)

Mute all participants when they join a meeting: on

- Extremely helpful in preventing accidental audio distraction

In Meeting (Basic)

Chat: on

- This is often a very lively and informative social sharing space

Private chat: on

- For private host-participant, host-host, or participant-participant communication

Auto saving chats: on

- While it may be useful to have a non-host (like the secondary account for audiovisual) save these to eliminate unnecessary editing, this is a good backup option so that chats aren't lost if things get busy

Sound notification when someone joins or leaves: off

- This can be a major distraction when there are more than a few participants

Send files via meeting chat: on

- This is great for sharing relevant documents

Co-host: on

- Critical for sharing responsibilities with Technology Coordinator, Speakers, Chairs, Technology Volunteers

Meeting Polls: on

- Helpful tool

Show Zoom windows during screen share: off

- Unnecessary

Screen sharing: on

- Helpful (popular) tool

Who can share? Host Only

- Cohosts should still be able to share; prevents possible security issues

Who can start sharing when someone else is sharing? Host Only

- Prevents accidental disruptions

Annotation: on (Allow saving of shared screens with annotations: check)

- Helpful tool

Whiteboard: on (Allow saving of whiteboard content: check)

- Helpful tool

Remote control: on (Allow remote controlling user to share clipboard: check)

- Helpful tool

Non-verbal feedback: on

- Useful live feedback for presenters

Meeting reactions: on (All emojis: select)

- Great way to communicate non-verbally

Allow removed participants to rejoin: off

- Prevents problem users from re-emerging

Allow participants to rename themselves: on

- Great for identifying preferred names, pronouns, and other info

Hide participant profile pictures in a meeting: off

- Better atmosphere when participants can see visuals of all participants

In Meeting (Advanced)

Breakout room: on (Allow host to assign participants to breakout rooms when scheduling: check)

- Very good option for both simultaneous social spaces (“lounges”) and small group activities: when creating, there is an option to let participants self-select rooms so that permanent lounges can co-exist with more temporally specific small group activities rooms

Remote support: on

- Good contingency plan for helping participants who are not very familiar with Zoom

Closed captioning: on

- Important for accessibility and also helps with audio clarity problems

Save Captions: on

- Accessibility feature allows reviewing of spoken content after the synchronous session

Group HD video: on

- Good video makes for a more “real” space

Virtual background: on (Allow use of videos as virtual backgrounds: check)

- These can be used for a variety of reasons: privacy, reducing visual distraction, “branding”

Video filters: on

- Helps participants correct or enhance their native environmental conditions

Immersive view: on

- A new, but promising, feature

Show a “Join from your browser” link: on

- Less demanding entry requirements for participants

Email Notification

When a cloud recording is available: on

- Helpful reminder

When the cloud recording is going to be permanently deleted from trash: on

- Helpful reminder

Recording

Local recording: off

- Increased comfort for presenters who may not want their session distributed

Cloud recording: on (Record active speaker with shared screen: select; Record an audio only file: select)

- Save the recording with an emphasis on the active speaker; audio-only is a smaller file that can be just as interesting in some contexts

Save chat messages from the meeting/webinar: select

- Chat logs are often as rich as spoken contributions, and may be the primary form of communication for some participants

Advanced cloud recording settings: Display participants' names in the recording; Record thumbnails when sharing; Audio transcript; Save closed caption as a VTT file

- Allows record of individual participation, both written and visual; transcript for accessibility (see above); VTT file is crucial if hosting recordings elsewhere later on (allows for closed captioning)

Allow cloud recording sharing: on

- Allows organizers and others access to recordings for collaborative editing

Automatic recording: off

- Only helpful if the conference is to be recorded in its entirety—otherwise, the extensive editing required to trim and separate clips is excessive

Require passcode to access shared cloud recordings: on

- Security measure

Viewers can see the transcript: on

- Accessibility feature (see above)

Telephone

Show international numbers link on the invitation email: on

- Useful for those who do not have internet access or who have connection problems—gives them agency to pursue alternate means of participating without requiring help

Mask phone number in the participant list: on

- Participant privacy

Zoom Session Settings

These settings can be toggled on and off throughout the meeting, and we frequently took advantage of this to help minimize interruptions or other potential issues.

Lock Meeting: off

- Some participants may need to gain re-entry because of connectivity problems, and others may simply join late

Enable Waiting Room: off

- Unnecessary variable

Hide Profile Pictures: off

- Better atmosphere when participants can see visuals of all participants

Allow participants in this meeting to: Share screen (check), Chat (check), Rename Themselves (check), Unmute Themselves (check), Start Video (check)

- These are all highly dynamic and should be changed according to conference activities (e.g. removing the ability for participants to unmute themselves during presentations, but returning this permission during Q&A)

Suspend Participant Activities: *use only in case of Zoom bombing emergency*

- This is the Big Red Button that does everything shy of ending the session, taking away most permissions, which will then need to be manually re-enabled—save for case of emergency (e.g. a Zoom bombing where you need to “freeze” everything in order to re-gain control of the situation)