Virtual Event Toolkit

This document provides advice and things to consider when planning a virtual or hybrid event rather than an in-person event. You will still need to think about usual event elements such as budget, resources, audience and event objectives.

Contents

[Tips for delivering online events 2](#_Toc72244899)

[Set an objective 2](#_Toc72244900)

[Audience 2](#_Toc72244901)

[Think about the timing 2](#_Toc72244902)

[What format works best for your event? 2](#_Toc72244903)

[Platform 2](#_Toc72244904)

[Content 3](#_Toc72244905)

[Promote 3](#_Toc72244906)

[The team 3](#_Toc72244907)

[Brief and prepare your speakers 4](#_Toc72244908)

[Rehearse 4](#_Toc72244909)

[Brand your event 5](#_Toc72244910)

[Make attendees feel involved 5](#_Toc72244911)

[Guests on the day 5](#_Toc72244912)

[Prepare for technical challenges 6](#_Toc72244913)

[Event Security & GDPR 6](#_Toc72244914)

[Follow up afterwards 7](#_Toc72244915)

[Making your virtual events accessible 7](#_Toc72244916)

[Useful articles 8](#_Toc72244917)

[Suppliers 8](#_Toc72244918)

[Technical Tips 9](#_Toc72244919)

[Recording a PowerPoint with narration and video 9](#_Toc72244920)

[Self-shooting a video on a phone 9](#_Toc72244921)

[University of Bristol staff with experience running virtual events 10](#_Toc72244922)

# Tips for delivering online events

Below are some best practice guidelines for running online events:

## Set an objective

* Set clear goals and objectives that can be met with an online event;
* Some events are not practical to be carried out online e.g. events with human contact;
* Events requiring relationship building can be done virtually but they may require an experienced facilitator or an organised shared activity.

## Audience

* Who is your audience?
* Are they internal or external, or both?
* How many people are you hoping to reach?

## Think about the timing

* Are you hosting an international event? Do you need to consider different time zones?
* Consider your participants and their schedules;
* Considerations should be made to ensure that those staff and students with parenting and/or caring responsibilities are able to attend.

## What format works best for your event?

* Some different event types include: lecture, seminar, panel discussion, conference, live meeting, or webinar
* Each of these allow the audience to interact in different ways.
  + A lecture or webinar is an online event that allows your audience to engage through a hosting platform and can run as live or on-demand.
  + Consider using a **webinar mode** with cameras only on the presenters. Participants can still interact using the chat function.

Platform

One of the key differences of a virtual event is that you will need to take into account which platform to use in lieu of a venue. You should also consider how attendees, speakers, and organisers will interact and engage with the system. When deciding on a platform you need to think carefully about your event requirements – there are several platforms available, each with varying functionalities.

We’ve provided a list of things to consider to help you decide:

* What functionalities do you need?
  + Presenter controls (a presenter needs to be able control items)
  + Content sharing (a presenter or host needs to share slides/presentation)
  + Audience participation (delegates need to be able to see/be seen/interact)
  + Chat functionality (delegates need to be able to chat)
  + Moderated Q&A (a Q&A function is required which needs to be moderated)
  + Multiple speakers on screen at once (for instance for a discussion)
  + Breakout room functionality (participants can be broken into smaller groups)
  + Event recording (the event is available for people to view afterwards)
  + Polls (could be achieved with Zoom, Mentimeter or Slido).
* Other platform considerations:
  + How does your audience tend to interact with technology – are they more likely to use a laptop, tablet or a mobile phone? Make sure the content works well on the device they are most likely to use.
  + For your planned content to work, what permission levels/functionality will your speakers etc. need and is this possible on your chosen platform?
  + If you’re hosting a conference or symposium, are you able to run multiple sessions from one account? With multiple users?
  + Accessibility: Do all attendees have access to internet? Or limited access/band width? Can they dial in by phone to the event?

Reviewing all the above will help you make the right decision in regards to what platform you need.

We recommend that you get in touch with the [IT Services Team](mailto:IT%20Service%20Desk%20%3cservice-desk@bristol.ac.uk%3e) ([service-desk@bristol.ac.uk](mailto:service-desk@bristol.ac.uk)) who will be able to discuss your requirements with you before considering the most suitable platform options from up-to-date information.

Content

* Is this a completely new event?
* Has it run previously in person?
  + It is worth reviewing your normal event running order and assessing which elements can easily be moved online, what might need to be changed or removed, and what new opportunities the online platform might present.
* Audience attention span tends to be shorter online – try to include interactive elements like polls and Q&As, make sure speeches/talks aren’t too long and include breaks if necessary. Using features like breakout rooms can also help to keep attendees engaged.
* Will you need a chair to open the event and introduce speakers?
* Will your content be live or pre-recorded? Pre-recorded talks/speeches have the advantage of being less likely to suffer from technical issues and require fewer speakers to be available and logged into the platform on the day of the event. However, live speakers can help bring a more personal and engaging atmosphere, particularly if there is a way for the audience to interact, e.g., a Q&A.
* Communicate the content of the event to your audience in your pre-event comms so that everyone knows what to expect. This can be particularly important to manage expectations if you are taking a popular in-person event online for the first time.
* Accessibility: Leave time to process information – 10 mins each hour.
* Accessibility: Build processing time/breaks into your event.
* Accessibility:Be aware of use of colours e.g. a red on green contrast can be difficult to read.

## Promote

* Provide plenty of notice to maximise attendee participation. This allows attendees to manage their workload, possibly around other meetings and responsibilities.

## The team

* How many people will you need to help support the event e.g., if you have a Q&A is your team big enough to monitor the audience view, support the speaker and moderate questions, or will you need extra help?
* Q&A functionality
  + This differs between platforms; you need to consider your speaker and audience and how best to manage a Q&A session. Most platforms have moderated Q&A functionality, which we highly recommend that you turn on. This means you can stop any inappropriate questions being posted.
  + You probably want a few people working on the behind-the-scenes Q&A moderation, if you are using a chair to moderate for the speakers (and therefore they only end up seeing the published questions) you should make sure they are clear on which ones to read first. Some platforms have the ability to ‘like’ questions when they are live, this means that they go up (or down) on the moderators' live screen and it should be recommended to the moderator they do try and get through the most popular questions first. You might also want to discuss with the moderator about who will delete the answered questions, will that be the moderators behind the scene, or them.

## Brief and prepare your speakers

* Outline the technical process in advance and ensure they know who their point of contact is for any issues.
* Make sure you send exact instructions on how to join any platforms to your speakers, organisers, and attendees. Make sure they are clear and concise.
* Provide practice sessions for presenters and speakers to test their skills and equipment before the event begins.
* Ask the speaker to join the event at least an hour before it starts to run through everything again and to check their Wi-Fi connection.
* Ask speakers to close all other applications and turn off notifications to stop alerts going off during the event. You could also recommend that they turn off or silence their mobiles to limit disruptions.
* Advise speakers on the best set up – generally a laptop or desktop is better than a phone. Do they need to read from a script? If so, they could practise reading from a hard copy and a copy on screen to see which they find easier and which looks better to the audience.
* If the speaker is external, check that there are no problems logging onto the platform from an external email address.
* Consider if you need back-up speakers. This may not be an option for keynote speakers etc., but if your speaker plays a more logistical role, e.g., introducing people/reading from a script, then having a back-up speaker in case of technical issues can be helpful.
* Consider implementing a timekeeping system to ensure your speakers don’t overrun. Will they manage their own time or will you? How will you communicate this with them?
* Accessibility: Describe live scenarios. For example, if you are presenting a live video tutorial of applying makeup, you could describe the process: “I am now applying a dark purple lipstick to my upper lip.”
* Accessibility: Describe any images, read any text that appears on screen, and describe anything that you gesture at as if you were explaining it to someone who isn’t in the same room as you.

## Rehearse

* Do a run through of the event to test the equipment, software and presentations at least a week in advance. This will allow you to make any changes in advance if the software or equipment you plan on using is not up to standard, or the user journey is not what you require it to be.
* Test yourself first if it’s a new platform, perhaps with some colleagues, so that you get a feel for the platform before you get speakers on to test. But remember, if you’re all on the same network you might not get some of the technical issues you may experience with an outside participant.
* Think about the user and speaker experience on a Mac, PC, tablet or mobile.
* Are you and the speakers in the location you/they will be when the actual event takes place? Internet and firewalls have an impact on connectivity to certain platforms.
* It can be worth doing a run though at the same time of day as the actual event. For example, if the event is taking place in the evening then artificial light can look different to natural light. Does your speaker need to adjust their position for this?
* If running multiple sessions you could rehearse the transitions between each, making sure the platform works as planned.
* Accessibility: Make sure the speaker’s face is well-lit and can be clearly seen.
* Make sure everyone on the call has the maximum bandwidth available by making sure no one else is using the Wi-Fi for any bandwidth intensive activities like streaming (Netflix) or online gaming.
* Test slide or screen sharing so that everyone is comfortable with how that works.
* Make sure you run through all the platform functions (chat, mute etc).
* If using polls or quizzes, can these be done on the same device as attendees are watching the event? Do attendees need to have a second device to hand in order to participate?

## Brand your event

* As there will be no physical event branding, how do you want your event to appear online.
* What branding does the platform you’re using offer?
* Check over the [university’s branding guidelines](https://uob.sharepoint.com/sites/marketing/SitePages/University-of-Bristol---Branding-Toolkit.aspx#powerpoint-presentation-templates) for advice and support.

## Make attendees feel involved

* Consider asking for input from attendees before or during the event.
* There are many features across platforms that can help focus participants' attention, drive engagement, and foster inclusion e.g. screen sharing, Q&A, activities using the digital whiteboard and the chat function.
  + If using Q&As you might want to have a few pre-planned questions ready to post in case you don’t get any live ones.
* Accessibility: Leave ample time for questions.
* Accessibility: If there is a method that will be used to vote or flag who can speak next, make sure all participants can access the process.
* Accessibility:Offer the option for anyone using chat boxes to have their messages read aloud to everyone during the event (either by using a revoicer or having an event organiser read them.

## Guests on the day

* Include clear descriptions and FAQs on your webpage/email communications.
* When you send your guests joining instructions make sure the instructions are comprehensive but easy to understand. Test the joining process if possible.
* If your guests will need to be assigned to breakout rooms, ask them to arrive early and explain why to manage expectations about waiting around.
* Guests may arrive early to your event so if possible have a holding slide(s) on screen with relevant information/advertising other events, rather than having a blank screen. You could also consider using a waiting room function if your platform has this. If you can’t start the event then post in the chat or Q&A box with information about the event start.
* If your content is best viewed on a bigger screen, then advise guests to use a laptop, desktop or tablet rather than a mobile phone.
* Decide if you want your guests to register for the event – advantages of this are that you can gauge interest in the event and send reminder emails.
* If your guests need to book to obtain links to the sessions how is this managed? Is there a manual element or is this automated? If manual, ensure you have considered how to manage late/last minute bookings.
* If your guests are from multiple different countries, make the time zone clear on all event information. This may also affect the time of day you want to hold you event.
* It is useful to have a housekeeping slide at the start of the event so that the host can outline how certain elements of the event will run. This could include how guests ask questions, use the chat function, any use of breakout rooms, planned breaks, whether they should have videos or microphones on/off etc.
* If your guests will be visible/audible at any point during the event, make sure they understand when they need to have their video and microphone on/off.
* Accessibility: Be patient with your attendees when you’re explaining how to use online platforms, especially if they are new to the platform and haven’t used it before. Repeat information if necessary.
* Accessibility: Loud videos may cause issue for some.
* Accessibility: Will any parts be on social media – some attendees may not have social media or may not want to use it for university or work purposes.
* Accessibility: Use accessible, plain language during the event and avoid using jargon.

## Prepare for technical challenges

* Have a plan B ready and that your whole team is briefed on these in advance. Thorough testing can help to avoid these scenarios but sometimes things happen on the day that couldn’t have been prevented.
* Make sure you have technical support available who are confident with the software and systems you’re using in case of any difficulties during the session.
* Make organisers aware that there could be factors beyond your control and ensure they have full access to the event details in order to communicate with participants, as well as alternative ways of contacting other organisers (e.g. a WhatsApp group).
* Consider having a pre-recorded copy of speakers’ sessions in case of any connectivity issues.

## Event Security & GDPR

* Ensure that the platform you are using is approved for use by University of Bristol IT Services and is GDPR compliant.
* If guests will be visible or participating in some way you may need to have terms and conditions that they agree to when they register. These terms and conditions should include:
  + A code of conduct, specifying what behaviour isn’t acceptable and what the consequences will be for inappropriate behaviour. You should have a process in place for inappropriate behaviour, e.g. removing the attendee from the meeting/stream.
  + Information about live streaming, recording and use of the recording/images after the event.
  + Any other uses of personal data for the event.
* Speakers should also be informed about whether the event will be recorded, what the recording will be used for how long it will be retained.
* Consider how to best reduce the chance that unregistered people will show up in your online space and disrupt it: such as individualized zoom links, passwords, enabling waiting room features, disabling screen-sharing, and locking the meeting once everyone has arrived.

## Follow up afterwards

* As with an in-person event it is important to follow up with those involved, thanking attendees, getting valuable feedback, and perhaps gathering material to assist with your next event.
* One way of doing this is to send a follow up email as soon as possible after the event has taken place, with a link to a feedback form.
* If they didn’t register think about other ways you could get feedback – would it be possible to have an interactive poll at the end of the event?
* Think about what attendance and engagement statistics you want to collect after the event. Does the platform you’ve chosen have a simple reporting function you can use or will you need to do more manual analysis.
* Accessibility: Share materials in an accessible format.
* Accessibility: If your team live-tweeted the event or if a Twitter chat was part of the event, create a blog post or other [easy-to-read collection](https://wakelet.com/) of those tweets for anyone who was unable to participate live.
* Accessibility: Offer your attendees the opportunity to provide feedback about the event, including accessibility, to help you prepare to plan the next one.
* Accessibility: Make accessibility an ongoing, inclusive conversation in your community for all types of events.

# Making your virtual events accessible

Accessibility should be considered from the beginning of your virtual event planning process, as it would be for your in-person events.

You should aim to make your event as inclusive as possible, so that the diverse requirements of your potential audience are included in your initial plans.

Your event registration system should also ask attendees if they have any access requirements, specific adjustments or accommodations that they need in order to access the event. This would ensure that any specific needs that cannot be fully met by running our usual virtual events, can be considered beforehand.

We must:

* Ensure any recordings that are hosted online are accurately captioned.

We don't have a legal obligation to provide the below for our virtual events, however, it's something we should aspire to:

* Organise a British Sign Language interpreter for the duration of your event;
* Use a system that offers live captioning;
* Choose a platform that is compatible with screen readers;
* Allow attendees to submit questions before the event begins;
* Provide materials in advance when possible;
* Add the timings and link to the recording on YouTube so anyone watching can switch to the part which is of interest to them (It may help those with access requirements to see what is covered in the event before they decide to watch it).

# Useful articles

Have a read of these articles for tips and best practice:

* Zoom blog: [Best practices for hosting a digital event](https://blog.zoom.us/wordpress/2020/03/04/best-practices-for-hosting-a-digital-event/)
* Eventbrite: [How to Host an Online Event or Webinar That Live Event Attendees Will Love](https://www.eventbrite.com/blog/host-webinar-attendees-love/)
* EventBrite: [9 Virtual Event Tips to Help Your Event Stand Out From the Crowd](https://www.eventbrite.co.uk/blog/how-to-host-a-virtual-event-ds00/)
* Eventsforce: [The Event Planner’s Guide to Free Live-Streaming Tools on Social Media](https://www.eventsforce.com/blog/the-event-planners-guide-to-free-live-streaming-tools/)
* Eventsforce: [7 Key Skills for Running Successful Virtual Events](https://www.eventsforce.com/blog/7-key-skills-for-running-successful-virtual-events/)
* Hootsuite: [How to Host a Successful Virtual Event: Tips and Best Practices](https://blog.hootsuite.com/virtual-events/)
* Cvent:  [Virtual Events in 2021: Guide for Hosting Online Events](https://www.cvent.com/en/blog/events/virtual-events)
* Cvent: [Virtual Conference 2021: Ideas, Tips, and Tools](https://www.cvent.com/uk/blog/events/virtual-conference)
* Making videos on your phone: [How to make pro videos with your phone during a pandemic](https://vimeo.com/405056245)
* Deaf accessible events: <https://hearmeoutcc.com/deaf-accessible-virtual-events/#tip-1-1>

# Suppliers

On the University procurement framework are a range of video providers that can assist you in filming and streaming your events:

* [**Evans**](https://www.evansstaging.co.uk/)
  + Contacts – [Reg Evans](mailto:reg@evansstaging.co.uk) (reg@evansstaging.co.uk) / [Tom Sanger](mailto:toms@evansaudio.com) (toms@evansaudio.com)
  + Full service live webcasting: filming, lighting and sound recording. Possibilities to record with multiple cameras and integrate on-screen graphics.
  + Examples of work for UoB:
    - [COVID-19 All-staff update](https://web.microsoftstream.com/video/b43b5e40-a9c0-47d5-bdc8-d03c90aa54d2) (Microsoft Stream, questions via [Slido](https://www.sli.do/))
    - [Live COVID-19 Q&A](https://www.facebook.com/bristoluniversity/videos/2607657556224079/) (Facebook Live, questions via Facebook comments)
    - [‘Towards a decolonised university’ panel event](https://www.youtube.com/watch?v=led1PkBg1AU)

* [**Beeston Media**](https://beestonmedia.com/)
  + Contact – [Hamish Beeston](mailto:hamish@beestonmedia.com) (hamish@beestonmedia.com)
  + Video production company. Possibilities to record with multiple cameras and integrate on-screen graphics. They’ve made over 500 films for UoB.
  + Examples of work for UoB:
    - [2019 Cabot Institute Annual Lecture](https://beestonmedia.com/video/public-lecture)
    - [Group feedback discussion for MOOC Cultural Studies and Modern Languages](https://beestonmedia.com/video/group-discussion)
    - [Message from Vice-Chancellor Hugh Brady to promote a new scholarship scheme](https://beestonmedia.com/video/executive-message)
* [**First Sight Media**](https://fsmevents.com/)
  + Contact – [Richard Belcher](mailto:richbelcher@firstsightmedia.co.uk) ([richbelcher@firstsightmedia.co.uk](mailto:richbelcher@firstsightmedia.co.uk)) / [Kora Slade](mailto:koraslade@firstsight.media) (koraslade@firstsight.media)
  + Video streaming and production company
  + Examples of work for UoB:
    - [July 2020 Virtual Celebration Events](https://www.bristol.ac.uk/graduation/virtual-celebration/)

# Technical Tips

## Recording a PowerPoint with narration and video

Here are instructions on:

* [How to record narration and video to a PowerPoint](https://support.office.com/en-gb/article/record-a-slide-show-with-narration-and-slide-timings-0b9502c6-5f6c-40ae-b1e7-e47d8741161c)
* [How to save a PowerPoint as a video](https://support.office.com/en-gb/article/turn-your-presentation-into-a-video-c140551f-cb37-4818-b5d4-3e30815c3e83). The video only needs to be 1080p.

The most important thing for this is making sure the audio is clear, so make sure to use a set of headphones with a microphone built in like you would on a Skype call.

## Self-shooting a video on a phone

* If possible, get some else to hold the camera for you making sure you are you are in the centre of the frame. Realistically you need you head with around 3 to 4 fingers width from the top of the frame. Try to hold the camera steady, a tip is not to hold it at arm’s length as this is when you are most shaky. Bend your elbows slightly and bring the phone closer to your body.
* Alternatively, you could look at using a small tripod. You can often find cost effective options online.
* Use a window to help light the video. Find a nice large window and stand ¾ onto it with your face being light by the window. Do not put the window behind you. If the sun is very bright the stand slight further away from the window. Once happy make sure you are looking at the camera. The sun light should act as a nice big light for you. Try not to use room lights just to light the video, sun light is much more natural and will look much better.
* Audio is key so make sure you don’t stand too far away from the camera. When you watch the recording back you should be able to have the audio on 2 3rds and still be able to hear it clearly. Don’t shout during the recording as this will make the microphone sound distorted and will sound odd. Make sure you are not in an overly echoey room as this will affect the audio quality.
* Check what is behind you when you film. Clear anything that looks messy or that you don’t want people to see (family pictures etc).
* Once finished, trim the video so to remove the long pause at the start and finish. Here is [how to trim a video on an iPhone or iPad](https://www.imore.com/how-trim-video-your-iphone-or-ipad).

# University of Bristol staff with experience running virtual events

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Staff member** Name  **Name** | **Team/dept** | **Type of event/ meeting** | **Main platform** | **No. of delegates** |
| Lowri Jamieson | Currently *Home Recruitment and Conversion*,  event organised for *Heilbronn Institute* | Conference | Cvent, Zoom, Remo, and Slack |  |
| Joel Morley | Public Engagement | Bristol Futures 2020 Virtual Conference | Zoom Meeting (with Otter AI for captioning), Zoom Webinar (with Otter AI for captioning), Remo | 8-120 per session |
| Rhian Jarman | SETsquared Bristol, Enterprise Services, RED | Tech-Xpo - Technology showcase & pitching competition | Hopin (hybrid & virtual) | 200 |
| Rhian Jarman | SETsquared Bristol, Enterprise Services, RED | SETsquared Connect – networking event | Zoom | 40-70 |
| Rhian Jarman | SETsquared Bristol, Enterprise Services, RED | Discover SETsquared – virtual open event | Zoom | 20-30 |
| Rhian Jarman | SETsquared Bristol, Enterprise Services, RED | Enterprising Women Showcase | YouTube stream | 100 |
| UK Events Team | Communications & Marketing | Hybrid Event, Graduation Celebrations, webinars | Zoom, VMix, |  |