

CI CS Workshop: Dos & Don'ts of Hosting a Virtual Workshop

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The Cyberinfrastructure Center of Excellence Pilot (CI CoE Pilot) partnered with ResearchSOC to organize the inaugural Cyberinfrastructure / Cybersecurity (CI/CS) Workshop. This 2-day event focused on actionable strategies, tactics, and techniques that are of value to cyberinfrastructure and cybersecurity professionals who support NSF research facilities and research projects. This inaugural workshop included presentations, interactive training, a virtual “hallway” for networking, and open forum/office hours.

The event was run by a mixed team of novice and experienced professionals. Many lessons were learned during the event and we have chosen to highlight what worked and what didn't in order to share this knowledge with our community.

DO

1. **Create a Timeline and List of Tasks:** If your event needs to happen in 2 weeks, 2 months, or TBD, you need a timeline to break down all the tasks in order to stay on track for a successful event. High level tasks to keep in mind when planning are:
 - a. Decide on content to include and how many days it would take to cover all that is desired.
 - b. Select a date range that doesn't conflict with any other major event; create an agenda for each day of the event within this range.
 - c. Design language and unifying graphics for branding of the event.
 - d. Set up a website and/or online home base where the latest updates for the event can be found easily.
 - e. Recruit your team; who will help you organize this event? Who will be the speakers/panelists etc. to present that can fit the event into their schedule.
 - f. Train your team; if applicable, team members will need to be taught how to do certain things (ie set virtual meeting room settings, use the virtual platform, etc).
 - g. Set up a shared workspace to create/edit documents, forms, etc.

- h. Send out internal and external communication; who needs to know what and by when? After the event, send out a survey to collect feedback.
- i. Acquire materials in a timely fashion for review before use; including, but not limited to: virtual background image, powerpoint presentation templates, final powerpoint slide decks from presenters, pre-recorded video presentations from presenters, etc.
- j. Decide on what technologies to utilize; virtual platforms can cater to specific event needs (ie webcasts, interactive note boards, chat rooms, forms, etc.) Do your best not require users to have multiple logins or switch platforms. Even though there is a tendency to use fancy platforms, in the end, tools that users are already familiar with make the experience better.
- k. Promote the event; utilize social media before, during, and after the event.
- l. Practice a run through of the whole process.

MUST DO: Be well aware of what resources you do and do not have for completing the tasks on schedule

- 2. Define and Delegate:** Hosting a virtual event isn't a one-person-job; you'll need to rely on your team for many aspects of the above mentioned tasks. Your team will need a detailed description for each role of their responsibilities so that they'll know who is doing what and who can answer any related questions.
- a. Internal team; designate a few people to act as go-to's for information. Identify other roles and resources your event requires ie security manager, note takers, graphic designer, etc.
 - i. Roles should be clearly defined and accessible in a shared workspace so that your team can refer to them easily.
 - ii. Keep in mind that virtual events require more event staff headcount and event staff preparation time than in-person events.
 - b. Attendees have a role too!
 - i. Communicate how you want attendees to interact during a talk/presentation; interactive conversation, hand raising, or listening.
 - ii. Inform attendees of the event's Code of Conduct and any consequences for inappropriate actions.
 - iii. Highlight tools attendees will use and where to download them if needed (Zoom, Slack, Youtube etc)
 - iv. Encourage networking by providing a place for attendees to enter in their professional contact information and bios.

MUST DO: have a centralized virtual help desk or email address for both the internal and external participants to use.

3. Be Clear and Precise in Your Communication: Double check the accuracy of information before hitting send or publishing. Quality content over quantity should be the aim.

- a. Presentation content should be proofread and curated in order to set the tone from day one of the event and throughout.
- b. While trying not to inundate mailboxes, remember to proofread emails and all documents.
- c. Meeting locations and times (including time zones) must be clear to all participants. It is helpful to provide time in at least 2 time zones.
- d. Ensure that any links have the correct url by sending out test emails to a few team members.
- e. Role requirements should be explicit; the participant should know exactly what is expected of them. Speakers might need to create a slide deck or a meeting room poll; moderators might need to record in their virtual meeting room.
- f. Ensure the speakers/presenters are aware of the capabilities you have ahead of time.
- g. During the event, your team should have a “cheat sheet” for all pertinent information in order to help people navigate the event. In addition, you might supply attendees with a Main document to access the agenda and other links from.
- h. Make sure you have an easy way for your team to quickly communicate (Slack or other direct messaging system).
- i. If there will be shared meeting materials (slide decks, video recordings, etc.) during and after the event, this should be communicated early on and they should be easy for attendees to find on the Main website.

MUST DO: utilize a Main Page for links to key documents and FAQs

4. Have a Backup Plan: Did a presenter call out sick? Did the webcast fail to load? Think of some common use cases that participants experience during virtual events and try to have a plan on what to do if the situation arises.

- a. Virtual events can be hosted on an online platform and/or streamed to multiple sites. For example, Zoom has a feature on certain types of

- accounts where it can live stream to YouTube for viewing concurrently; you need only to provide the url to attendees.
- b. Double check with your presenters/panelists etc. about their schedules and internet connection in case any last minute changes are needed. Do a test run before the event to ensure everything is working on their end and yours.
 - c. In case of lost connection, make sure some meeting materials are available offline. Pre-recorded presentations can help here.

DON'T

1. **Do not over commit.** If your resources are lacking, try a simple approach. Concentrate on the quality of the content that you're inviting people to engage with. Design your event around what you can confirm and rely on. If that means turning your event into a panel discussion instead of separate talks, then do it. Making things easy for all participants will ensure that your event is straightforward, memorable, and useful. It is okay to have one headliner and a few opening acts!
2. **Do not forget to proofread.** Think of your audience and their needs. Tone comes through in text, graphics, and presentations, so be aware of the overarching goal that each piece of communication is aspiring to achieve. If the goal isn't being achieved, the participants won't understand fully and changes need to be made. So, provide feedback! If there is a misprint, correct it as soon as possible and point out the correction clearly. Use your team to interpret content, proofread, and test links to best ensure that all information is correct and current.
3. **Do not be afraid to have short events across multiple days rather than a long, single day event.** We are used to all day events because of travel overheads. When doing things virtually it is important to rethink some things and consider that participants are at home and have other duties and distractions. They also have "Zoom fatigue", which means that they will not be able to concentrate for a long time in one day. The multi-day events also don't need to be run on consecutive days, but do consider that some participants teach, have

family obligations, or other conference commitments, so having an event Tue/Th may make it impossible for some to attend.

- 4. Do not limit your types of content:** Incorporate panels, talks, and office hours, but be sure to give good time blocks and meaningful breaks of 30 minutes or so. Keep the chat feature on (in Zoom) to encourage participation and colleague conversations to add to the content.
- 5. Do not forget to have a little fun!** Yes, virtual events are educational, but they are also an opportunity to meet new people, try out new technology, and share experiences. Incorporating a space for general comments, feedback, conversations, even gaming or at-home yoga between presentations can really make your event a positive experience!