ICERM's Best Practices for Virtual Events

What follows is a list of best practices for hosting virtual events based on lessons ICERM has learned from our experiences. These points may seem obvious to some, and indeed, they follow ICERM’s general operating philosophy. However, we list them here in the interest of furthering the broader discussion of facilitating continued research in a virtual environment.

Keep It Simple

This is perhaps the most important principle, and it overlaps a lot of areas. Remember that not everyone has the same level of technical knowledge and confidence. When choosing a conferencing application, make sure the interfaces, at least for the basic options, are intuitive and user friendly. Application client downloads should be easy to access. Installs and configurations should require minimal effort on the part of the user.

We also strongly recommend, where possible, choosing tools that are platform agnostic, widely accessible, and require minimal hardware. Any one of these could hinder a user’s ability to participate.

The logistics of participation should be simple as well. For example When hosting multiple sessions within a single event, a shared link for all sessions is recommended if possible to reduce confusion.

Where security is concerned, consider carefully how much you really need, and don’t secure beyond that. Registrations and passwords add complexity to the user experience and may make more hassle than some are willing to endure to participate. We realize this won’t be a popular idea among security minded IT people. The balance between security and usability needs to be adjusted carefully, especially when the goal is broad accessibility for a large set of users with unknown or poorly defined operating parameters.

Practice

Ideally, the support staff should be experts with the tools being used. Anyone with an active role, such as session chairs, panelists, speakers, should be given an opportunity to familiarize themselves with additional functions they may need to use before the actual event. For example,

our team provides speakers with an opportunity to schedule practice time in order to try out screen sharing functions and the like the week before an event. Unusual transitions or special functionality should be mapped out and tested ahead of time.

Organization

Session chairs have proven to be a vital part of the logistics of our virtual events, particularly when running events that have multiple talks in a session. Chair duties are similar to in-person workshops, including speaker introductions, moderating the audience for questions, and keeping the session generally on schedule. Ideal chairs will have some knowledge of the scientific topics being discussed.

Support

ICERM has a team member actively monitoring, but not participating in all virtual events. This person is primarily there to help if there are technical issues, but also serves as another check on chat logs to make sure there isn’t an overly large backlog of unanswered questions, and to assist with things like speaker transitions and breakout rooms. Generally this person serves as “meeting host” from a technical standpoint, and has full control of the application used for the event.

Communicate

This is perhaps as important as simplicity. Communicating early and often allows clear expectations to be set for everyone involved. Open dialogs as early as possible with anyone in an active role. Make sure they understand what it is they’re expected to do and when. Ensure that everyone understands what your tools will and won’t do. Provide links to documentation and how-to guides as well as any necessary software downloads.

Be Flexible

Virtual events introduce a wide variety of factors that are outside the control of the host. Internet connections drop or are bogged down. Pets and people make surprise appearances. Hardware breaks or is suddenly inaccessible. Have a contingency plan, such as a stand in speaker, or a backup QA session. We also recommend having multiple means of contact for speakers and panelists (i.e. email and phone) in case they are unexpectedly absent.

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