ORGANISING AN ONLINE EVENT- RESOURCES AND GUIDANCE

The following information includes tips and links to external resources to help you plan and deliver an event online. All University of Exeter staff and students are welcome to use and share this information. In addition to the details below, there is a selection user guides and training videos located in The Digital Hub. The People Development Team also have specific guidance for online Remote Training sessions.

Introduction

There are many benefits to holding an online event as opposed to a physical or 'in-person' event. Online events are more cost effective, more sustainable, and most importantly at this present time, comply with social distancing rules. Transitioning your physical event to an online event or creating a new online event is the best way to safely and effectively engage your community and clients.

Note: If you have speakers at your event, the University Speakers and Events Policy (Exeter) / Speakers and events Process (Cornwall) must be followed, including risk assessment and approval of your speakers.

What are online events?

An online event involves people interacting via a web-based platform, such as Microsoft Teams. These events allow attendees to connect across the globe and include interactive engagement features such as question and answer sessions, video and audio calling, sharing content, instant messaging and recording functions.

Types of online events

What are the different types of online events?

Conference

An online conference will often have several keynote speakers and multiple breakout sessions on specific topics. It is an interactive event that brings together a large group of people with similar interests or expertise to collaborate and engage with.

Webinar (online seminar)

This is an engaging online event where a speaker, or speakers, will deliver a presentation to an audience who can participate by submitting questions, responding to polls and using other available interactive tools.

Hybrid event

An event that takes place offline (eg a lecture theatre), while also being attended by a live and interactive audience.

Online meeting

When two or more participants come together to discuss particular topics using the interactive tools such as video or audio and sharing content.

On-demand
This is a pre-recorded event that can be viewed at any time.

Live stream
Live streaming is the broadcasting of a live video to an audience via the internet.

Benefits of online events
Online events deliver many of the benefits of a traditional physical event and offer different advantages too. When holding an online event you can:
- Engage with your partners and stakeholders
- Invite keynote speakers and speaker panels to present content and engage with audiences
- Share high quality pre-recorded and live streamed content
- Ensure a lower carbon footprint, and still attract a global audience
- Collaborate, call and meet from anywhere and at any time
- Host conferences, webinars, seminars and events with 1 to 300,000 attendees, including internal and external participants
- Create cost-effective events - online events offer many savings on operational costs, such as travel, venue hire, hotel accommodation and catering
- Measure results and feedback
- Encourage networking. Attendees can engage in the comments and chat section available within many online event platforms, such as Teams. You can provide a space for people to interact, share their thoughts, and discuss the event, in real time.

Online event resources at the University of Exeter
The University has several resources available to support the organisation and host online events, including meetings, workshops, conference and training events.

Microsoft Teams
All University of Exeter staff and students have access to Microsoft Teams, an online tool designed for collaboration. Teams can be used to host all types of online events, and guests can be invited. Chat features support audience participation, enabling live feedback and question and answer sessions.

There are currently two possible ways to meet in Microsoft Teams - meetings and live events:

Meetings in Teams
- Include audio, video, breakout rooms and screen sharing for up to 300 people
- Enable interactive, collaborative meetings with people inside and outside of the University
- Teams is the current recommended option to create an event and should cover most meeting, event and training requirements

Live events
- An extension of Teams meetings that enables you to schedule and produce events that stream to audiences between 250 - 10,000, for up to four hours
- If your meeting exceeds 250 participants, it is recommended that you engage an event team – a small group of people who will take a lead on the professional facilitation of the event - you'll need to assign a producer to support the presenters and speakers

- To set up a live event, please contact the Exeter IT Helpdesk who will direct you to an online form to complete
- The Events Team can support with guidance and advice if required and training is available online
- To schedule a live event to be set up please do so via the SharePoint form

To learn more and to find training for Microsoft Teams, please visit the Microsoft Teams training section of the Office 365 Help and Support site and the University's Microsoft Teams Stream channel for a selection of training videos.

Zoom

Zoom is the alternative online meeting and conferencing tool that the University now supports, meaning all staff and students can host Zoom meetings.

- Our Zoom for Education licence allows up to 300 participants to meet and you can view up to 49 participants on your screen
- Participants can share content - video and audio however Zoom also allows meeting hosts and co-hosts to mute all participants and to control a number of other security features, should they wish to
- Zoom allows you to easily manage breakout rooms, including the ability to make the same announcements to users in all the breakout rooms - this is very useful for calling everyone to bring their discussions to a close and return to the main meeting
- The University's secure Zoom settings have now been updated to allow people without an existing Zoom account to join meetings created by University users. Please note that to maintain the highest level of security you must only admit the intended recipients of the meeting. These changes have been made to ensure the user experience across Zoom and Teams is similar. Teams remains the primary communication tool at the University as it is secure and allows for smooth collaboration, including with external participants.
- Zoom closed captions require a person to manually type what is being said.

To get started with your Zoom university account, instructions on how to set up your free Zoom univeristy account can be found here and instructions on how to login to Zoom can be found here.

You can view this guide to familiarise yourself with the latest settings for using Zoom via the Digital Hub. New to Zoom? Have a look at the University's introduction video.

Recap (Panopto)

All staff, including teaching staff, can use a Mac or Windows version of Recap which allows you to share complex teaching materials and record lectures. Pre-recorded content can also be created using mobile devices.

Ideal for: recording and webcasting lectures.
- No limit on participants, however a University of Exeter login is required.
- You can record and webcast your presentations and complex teaching materials.
- Only one presenter.
- Webcast from any computer using the desktop client.

Webinars
- The recommended way to run a webinar in Teams is to use a Meeting
- Teams Meetings are better suited for smaller or collaborative sessions

- You can share a view of your desktop or application, chat, create a whiteboard and poll your students. Invitations can be sent to individuals or teams of people

Breakout Groups
- Breakout groups are smaller discussion groups that run alongside a main event session. They provide the opportunity to consider and discuss event topics and idea sharing
- Within these smaller discussion groups, participants can start their own chat and collaborate on documents
- Breakout groups can now be facilitated in both Teams and Zoom meetings.

Use the University's comparison tool to help decide which tool to use.

Pre-recorded content

Recap
Recap, although primarily used for teaching, is also a great tool for creating high quality pre-recorded content. It can be used in conjunction with PowerPoint to distribute a presentation to a wide audience. Any content created using Recap is exportable as a video or audio file.

All staff, including teaching staff, can use a Windows (or Mac) version of Recap which allows you to share materials and pre-record presentations, lectures, talks and other content.

This version of Recap works without the lectern-based physical button normally employed on campus within a lecture theatre.

Further information and a quick guide to using Recap.

External online event providers
Third party suppliers may be useful to engage when planning and running an online event, at an additional cost. They can help with the production and design of events, including more complex event management (e.g. presenters, live content, etc.). We advise using such external services if your event requires a combination of online and physical elements or is highly technical with a large audience.

Two recommended suppliers the University uses are:

Warwick Event Services
An Exeter based AV company, providing sound and lighting plus stage management, exhibition set design and display solutions.

First Sight Media
A production company with an emphasis on video and streaming production, they also help deliver virtual graduation ceremonies.

Accessibility
As an inclusive University, when organising events online you need to consider the accessibility of the event. We have detailed below options of how to support access requests.

Access for people who are deaf or hard of hearing or have sensory disabilities

- Ensure the audio is clear. Poor audio quality can make it difficult for participants to hear and access the event. This can be avoided by the speaker using a headset and apps like Krisp to reduce the background noise.
- Minimise any disturbance during the event by asking hosts and presenters to base themselves in a quiet room and to keep all background noise to a minimum by asking those not presenting to mute their microphones.
- Encourage speakers to introduce themselves every time they speak, this will enable participants to follow who is speaking.
- Closed captions (subtitles), display text on a screen or a visual display to provide interpretive information. Both Zoom and Microsoft Teams offer this function in slightly different ways. Zoom closed captions require a person to manually type what is being said. Whereas in Microsoft Teams they are automatically generated. Full details are available for close captions in Zoom and Microsoft Teams.

Access for people who are blind or visually impaired or have sensory disabilities

- Ensure the room is well-lit so speakers can be seen clearly.
- Interactive tools can be used during online events such as a vote or questions and answer session, ensure all participants can access the process for this.
- Describe live scenarios. For example, if you are presenting a live video and choose to include a live demonstration, describe the process throughout the display, this will also keep the audience engaged in the event.
- Speakers should describe their presentations from text, images and gestures that will appear on the screen.

Access for people who are intellectually or developmentally disabled

- Remember attendees may not have used your chosen online platform before, so be patient and repeat information when required.
- Avoid using jargon, use plain language and explain abbreviations or acronyms of any words used during the event.
- Include breaks, processing and question time on the event agenda.
- Provide options for participants asking questions via the chat box, to have their questions read aloud, by using a revoicer or having the presenter read the questions during the event.

After your virtual event

- Ensure all materials and recordings of live sessions are shared in an accessible format.
- Create events that are inclusive and accessible for all.

More information for organising accessible events can be found via Accessible Events: A good practice guide for staff organising events in Higher Education.

Online events risk assessment

Event managers must ensure that all hazards associated with an event have been identified, as far as is reasonably practicable.

Event managers must ensure a suitable and sufficient risk assessment is in place. Where risks have been identified, the event manager will ensure that action is taken to eliminate, reduce or control the risks so that it is as low as is reasonably practicable and the control measures are documented in this risk assessment.

A specific Risk assessment for online events is recommended for use by the event manager. If you have speakers at your event, a speaker risk assessment must be conducted and approved in accordance with the University Speakers and Events Policy (Exeter) / Speakers and events Process (Cornwall).

Registration and promotion

Registration and invitation tools

Like any event, when organising an online event, you will need to send out an invitation or link to register, allowing people to sign up. Below are some options the Events Team can support you with.

Invitations via MS Teams or Outlook

The quickest and easiest way to invite people is via Teams. Using the calendar, you can create the event or meeting by selecting "New Teams Meeting" and adding the participants to the calendar request. Once sent, the participants will receive an email that includes a link to 'join the meeting'. If a participant is using Outlook or Teams they can also find the 'Join' button from their online calendar. If you have a large invitee list or are sending the invitation to one or more distribution lists, inviting people via Outlook is a better and quicker option.

Invitations via Eventbrite

Eventbrite can be used as a way of registering participants for any event, including an online event. The benefits of using Eventbrite include the flexibility to include a large amount of detail around the event (for example, you can easily fit onto one screen the agenda, some background information on the event and an image). It also offers the option of creating different ticket types (i.e. free tickets or paid for tickets). Users of Eventbrite can link the registration page to the source of your live streaming (i.e. Teams or Zoom). Further reading on how to set up an online event can be found here.

Promoting your event

The Events Team can help promote your event for you using various methods – listing your event on the University of Exeter website, including it in the Weekly Bulletin and any relevant College led newsletters and promotion on social media. The University's Yammer or SharePoint pages can also be used to promote events. Please note that any promotion you undertake for your event must comply with the University Leaflets and Posters policy. This sets out clear expectations that incitement to or support for illegal and extremist activity is not permitted.

Joining instructions

When sending out joining instructions for online events, ensure to include clear details on how users will access the online event. We have drafted a set of joining instructions specifically for use with a Microsoft Teams Meeting based event to download and edit. This template can also be edited to suit other types of online events.

Best practice for delivering online events

Below are some best practice guidelines for running online events:

Set an objective

Ensure your event has clear aims and objectives that can be met using an online event. Some events are not practical to be carried out online, for example celebratory or social events with human contact and relationship building being essential.

Work as a team

Especially for larger more complex events - ensure there is more than just the person in the delivery team. A presenter and a producer will both be needed to ensure the slick delivery of an event. The producer can be available to deal with any technical issues and respond to participants questions.

Promote

Ensure plenty of notice is provided in order to maximise attendee participation at your event. Your event must be advertised well in advance, to allow attendees to juggle their workload, possibly around other meetings and caring responsibilities.

Think about the timing

Think carefully about timing, both in terms of time zones (if hosting an international event) and consider your participants and their schedules. Remember the University is subject to the Equality Act 2010 and considerations should be made to ensure that those staff and students with parenting and/or caring responsibilities are able to attend.

Choose your platform wisely

Is a live meeting or webinar more suitable? A webinar is an online event that allows your audience to engage through a hosting platform and can run as live or on-demand.

Communicate with your audience

Remind attendees when the event is – as you would with standard events. Send reminders with final details in advance of the session to keep people updated and interested in the event.

Start the conversation before the event

Successful events require preparation. Circulate your agenda and set your objectives prior to the meeting or event. If using Teams, you can save an agenda and other relevant documents in the files section of the Team group or post the agenda in the chat section to encourage the conversation to start prior to the meeting. Agendas and objectives can also be circulated with an event or meeting invitation.

Other options are; setting up a Yammer community to promote, share documents and allow for attendees to ask questions (if it is an internal event) or set up a SharePoint communication site to share the documents (you can also embed a Yammer community into the site, so everything is all in one place).

Brief and prepare your speakers

Ensure any speakers understand the technical process in advance of the event and who they should contact to discuss any issues. Think about providing practice sessions for presenters and speakers, in which they could test their skills and equipment before the actual sessions take place.

Rehearse

Test the equipment, software and presentations in advance. Trial the event with the planning team, this should enable you to make any changes in advance if the software or equipment you plan on using is not up to standard.

Brand your event

Think how your event will look. As there will be no physical event branding, how do you want your event to appear online. It is an option to commission the Design Studio to support you when

designing your web and registration pages, presentation slides and visual content, to give your event a professional and coherent identity.

Make attendees feel involved

Dependent on the type of event, you may wish to ask for input from attendees before or during the event. Once an event begins, there are many features that can help focus participants' attention, drive engagement, and foster inclusion. These include screen sharing, Q&A, brainstorming using the digital whiteboard and the chat function.

Prepare for technical challenges

As with a standard event, ensure you have someone (or a team of people) confident with the software and systems you're using in case of any technical difficulties during the session. *Be aware on the day there could be factors beyond your control and ensure all organisers 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).

Follow up afterwards

This is the perfect opportunity to follow up with those involved, thanking attendees, getting valuable feedback, and perhaps gathering material to assist with your next event. A simple way of gathering feedback is to send a follow up email as soon as possible after the event has taken place, with a link to a feedback form.

Further reading and technical support

Further reading

Hootsuite Blog - How to Host a Successful Virtual Event: Tips and Best Practices
Eventbrite Blog - 30 Tips and Tricks for Hosting a Successful Online Event
Eventbrite - Tips for setting up an online only event

Technical support

The University's new Digital Hub: find answers to your digital questions
The University's guide to Teams including FAQ's and quick start guides
The University's Microsoft Teams Stream channel has a selection of training videos and Office 365 training is available on SharePoint
The University's IT Helpdesk - and Self Service Portal
Technology Enhanced Learning pages for help and support

FXPlus Cornwall Campuses Technical Support

For colleagues based on our Cornwall campuses, please use the Self-Service Portal to log new incidents and service requests, view the status of logged calls and to update as necessary. Access instructions are available on the FXPlus webpages. Alternatively email servicedesk@fxplus.ac.uk or tel +44 (0)1326 213822.