

# Organizing Samvera Connect On-line

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For a number of years, Samvera (and previously, Hydra) has maintained in the wiki a manual, of sorts, offering facts and advice for organizing face-to-face (f2f) Connect meetings. The manual is aimed at the local organizing team rather than at the program committee. In 2020, the COVID-19 pandemic forced Samvera Connect on-line and the general consensus seems to be that it was a very successful event; this despite the fact that it was the first time organizing an on-line conference for all involved.

This document, written after the event, is an attempt to bring together salient information and advice for those organizing Connect On-line 2021, (the decision having been taken that this, too, must be virtual), and any future such events. Like the manual for the f2f event, it is intended that this document be updated each time such an event takes place to reflect changing needs and circumstances. Unlike the f2f manual, this document is aimed more at the program committee - there being no physical space to manage.

## Planning

As there will be no local Organizing Committee, it will fall to what was previously 'just' the Program Committee, working with Samvera's Community Manager, to coordinate planning. The Community Manager will act as liaison between the Program Committee and Samvera's Steering Group.

The Program Committee should have a designated facilitator (and/or Chair) who will ensure that each meeting of the group has a prepared agenda in advance. Meetings/calls should be minuted and clearly identify decisions and action points (with names) within Samvera's Google WorkSpace to support transparency and allow us to learn from one another for subsequent events. The Community Manager should check the page regularly to see that the action points are being dealt with in a timely fashion. The group should use a dedicated email list (currently [connect@samvera.org](mailto:connect@samvera.org), but in future a WorkSpace list may serve better) to make sure every member receives every email.

## Timing

Every effort should be made to ensure that the dates for the Connect meeting do not clash with other events that might draw on the pool of potential delegates. In particular, the DLF Forum takes place at a similar time of year and its proximity on the calendar can be a problem for potential attendees. It has been pointed out that late September and into October is the time of several Jewish high holidays which may prevent some of our colleagues attending.

For the first Connect On-line it was planned that the 'traditional' workshop day be on a Thursday, the 'plenary' day on the Friday following, and that presentations would take place over the Monday - Wednesday of the following week. In the event, the presentations were extended into the Thursday in order to accommodate the number of worthy proposals made. Each day consisted of approximately three hours of content interspersed with one or two short breaks. The timing of the three-hour block was arranged to try and have it not start too early in the western USA and not end too late in Europe. No attempt was made to accommodate the specific needs of people in a wider range of time zones.

Community Building Events (aka Social Events) were arranged prior to, and following, the sessions Friday - Wednesday.

### **Facilities (aka software tools)**

As in previous years, the conference made use of Sched (sched.com) who offer us the 'not-for-profit' rate of \$250 (2020) for up to 500 delegates; the fee was paid centrally from Samvera funds. In 2020 we made use of Sched by the delegates themselves more or less mandatory (before, it had been an option) in order to receive URLs to access various parts of the conference and to register for workshops and social events.

The five main days of the conference itself were mounted using Zoom Webinar, the facility having been kindly provided by Indiana University. The workshops, social events and poster discussions (see later) employed 'simple' Zoom generally using facilities provided by the session organizer(s).

Zoom Webinar allowed us easily to record all the formal sessions Friday - Thursday and, because it requires log-in, protected the event from 'Zoom bombing'.

There was no 'unconference' portion to Connect 2020 On-line which previously has been managed using 'Sessionizer'.

## **Booking**

Although Connect 2020 On-line required no registration or hotel bookings in quite the way that an f2f conference would, there are some similar concerns.

### **Sched**

In addition to information on the Samvera wiki, all information relating to the conference sessions was provided in Sched. Delegates were asked to create an account for themselves in Sched in order to facilitate a number of things:

- Registration for workshops was handled by 'booking' a place for the session in Sched. The URLs for the workshops themselves (simple Zoom, rather than Zoom Webinar, and therefore potentially susceptible to 'Zoom bombing') were made available by mailing them to the registered delegates through Sched.
- Sched provides a simple way for organizers to mail all the registered delegates, or the delegates who have signed up for a particular session. Detailed conference information was not provided on 'public' mailing lists (see 'Zoom bombing'). Session organizers themselves can mail their attendees (although this process is moderated by the Sched administrator(s)).
- Sched provides the opportunity for delegates to create a conference program for themselves and be automatically reminded of "today's sessions" (not all delegates will want to attend all sessions). The process is monitored by Sched and provides the organizers with a good idea of the likely attendance.

Frustratingly, Sched does not allow organizers to cap the attendance for a session. This facility would have been very useful to a number of the workshop organizers who were concerned that they would be overwhelmed. In the event, workshop actual attendance was some 50-60% of the registered numbers.

### **Zoom Webinar**

Zoom Webinar requires delegates to register separately from Sched in order to be granted access to the conference sessions. The need for this 'double registration' caused some confusion and would be better avoided in future years. Late in the pre-conference process it was discovered that it was possible to export the email addresses of all the Sched registrants. It would be useful if, in future, a way could be found to use this export to register people in Zoom Webinar if possible. Zoom UI and functionality changes are released on a rolling basis; available interoperability or data exchange should be investigated and decided on by organizers as part of the planning process.

Accessibility is a webinar consideration that should come early in planning. Services are available that will provide human-generated live captioning for a fee (rates vary widely). There are several companies in this space and Zoom has features to allow them special access specifically for the purpose of providing caption content through the Zoom UI.

### **Website and wiki**

In order to decide whether to attend, and then what sessions to attend, Delegates and potential delegates will expect to find a gateway to the conference information at [connect20xx.samvera.org](http://connect20xx.samvera.org). However, a website is not a convenient way to handle evolving and somewhat fluid information. The solution employed has been to make the web page(s) very simple; providing little more than links pointing into the Samvera wiki which is more easily maintained. In 2020, our colleagues at Lyrasis arranged the necessary DNS work to set up the URL.

The wiki information should be free standing, which is to say that people should be able to access the conference information without necessarily entering through the web presence: to that extent, the wiki will need its own conference 'home' page with links to the same inner pages referenced

from the web. Registration information and program information should be clearly separated. In 2020 we broke pages into seven sections:

- Calls for proposals
- Workshops
- Program
- Community Building events
- Posters
- Registration
- Conference shop

Additionally, the web and wiki pages offered a 'contact us' link which initially generated an email sent to [connect@samvera.org](mailto:connect@samvera.org), but later to the newly appointed Community Manager.

## Organizing the conference content

### Content types

Connect 2020 On-line offered a number of content types:

- Workshop sessions (1.5 or 3 hours)
- A plenary session
  - Welcome
  - Code of conduct information
  - Keynote address (40 minutes including questions)
  - 'State of Samvera' address (20 minutes)
  - Updates on the major software initiatives (20 minutes each)
- Presentations (20 minutes + 5 minutes questions + 5 minute changeover)
- Lightning talks (7 minutes)
- WG/IG updates (5 minutes, 2 slides)
- Poster sessions
- Community Building (Social) events

### Planning

Discussions about the outline timetable need to occur very early in the planning process and dates will need to be set for sending out various informational emails and the deadlines they may contain.

The wiki page setting out the various calls for proposals (CfPs) [can be found here](#) (or at the equivalent place in the new cloud-based wiki) whilst the matching Google forms can be found in the 'Samvera archived events - Samvera Connect - Samvera Connect 2020 - Forms' folder in Google Workspace.

As proposals come in, it has been our practice for the last several years to record them using the [samvera-labs part of Github](#) in conjunction with the Zenhub plug-in extension for organizing and labelling tickets. All the information from the forms is duplicated on the ticket and labels attached indicating the various categories into which the proposal fits. Red and green labels are 'reserved' to

indicate the progress of the proposal from 'just received and needs a lot sorting out' (red) to 'all agreed' (green). An inspection of the board for 2020 will make the process fairly obvious.

The on-line conference in 2020 presented the Program Committee with a new problem: more presentation proposals than could be accommodated in the three days allocated. A fairly rigorous assessment process was introduced (see below) which reduced the number slightly and, in the event, an extra day of presentations was agreed. The assessment process does, though, offer a transparent way of dealing with an evaluation of the proposals and ranking them in order. This is not to suggest that the ranking is the final arbiter of what is included and what not; it may be necessary to discard some of the 'worthy but not wonderful' offers in a particular category in order to achieve an overall balance of content types across the conference.

Once a proposal is accepted, the program information is made available on the program page in the wiki and duplicated in a Sched entry. These text entries will need updating as a timed program is agreed.

### **Workshop sessions**

Connect 2020 took a very vague view of what constituted a 'workshop' because the on-line format made some 'traditional' workshop activities problematic. If at all possible, a range of workshops aimed at different groups of delegates would be desirable. For the past several years a workshop for 'beginners' has been provided and has been well received.

### **Plenary session**

In addition to the 'administrative' elements of a welcome and a 'Code of Conduct' presentation, the 2021 event will likely have at least three elements: a keynote address, a 'state of samvera' address and updates on Samvera's main software initiatives - Hyrax, Hyku, Valkyrie and Avalon. The presenters for all these items should probably be advised that, given the on-line format, their audience may not be as 'Samvera-savvy' as an f2f group and they should make allowances for that; they shouldn't assume prior knowledge. The keynote speaker needs to be identified as early as possible so that their coming contribution can be well advertised (and to stand a chance of getting into said speaker's calendar!).

In 2020 we asked speakers (both plenary talks and the later presentations) to provide their slide packs ahead of time into a shared drive. This had the double benefit of meaning that we had a copy to fall back on in event of technical difficulties (though, thankfully, that need did not arise) and that we did not have to try and gather all the packs together post-event to put in our repository archive. Speakers were surprisingly cooperative about this and all but a couple were supplied ahead of time.

### **Presentations**

In 2020 we failed to build into the program a short slot at the beginning of each day to reiterate the code of conduct information. This was unfair on the first presenters of each day and should not be repeated! If there was a criticism to be made of the presentations in general, it was that after being introduced, too many appeared unsure of how to share the Zoom screen and/or which of their own screen buttons to press to start the presentation. Presenters should be strongly encouraged to take part in a short practice session prior to the conference so that they can project a slightly more professional image!

## **Lightning talks**

Lightning talks (7 minutes) were grouped to fit into a 40-minute program slot. This seemed to work well.

## **Working Group and Interest Group updates**

WG and IG facilitators were invited to present a 5-minute, 2-slide update on the group's work. The idea was that one slide should be the bullet points of their talk whilst the other was contact and meeting information. Most people stuck to this format. Like the lightning talks, these presentations were grouped into a block. Because of the need for slick changeovers between short presentations, the slide packs were required beforehand and were combined into a single, centrally-presented sequence.

## **Poster sessions**

The on-line format of the 2020 conference meant that the popular f2f poster session could not take place. The Program Committee instead invited 'posters' (any format suited to screen display by a browser) which were made available on-line ten (?) days prior to the conference. Contributors were invited to supply also a textual or AV commentary on the poster, though most did not. At the beginning of the week having the workshop and plenary days, 'drop-in' slots were arranged on Zoom when the poster author(s) would be available to discuss the poster. These slots seemed reasonably well used; the asynchronous discussion channel set up in Slack was not. The most disappointing thing about the poster sessions was the low number of posters submitted. Perhaps in 2021 the CfP should emphasise how well received the 2020 posters were (despite the untried format) and stress that creating a poster could be a worthwhile endeavour.

## **Community Building (Social) events**

Community building events were offered in the half hour before and after the sessions each day. Volunteers led these events, and they could be planned by a subgroup of the planning committee or by a separate social committee. There were conversation groups, karaoke, a scavenger hunt, Gender Minorities of Samvera conversation time, and other events all held via Zoom. Feedback indicated that descriptions of these sessions offered well ahead of the conference would boost attendance.

## **Mentoring**

For a number of years we have offered a 'mentoring' program pairing a volunteer, established member of the Community with newcomers who avail themselves of the service. This service is not heavily used but seems to be appreciated by those who have done so. It requires a small group to seek mentors and mentees and then pair them up - ideally according to shared interests.

## **Swag**

It has been our custom for many years to provide, as part of the registration fee, a conference t-shirt. The design for all of these has been provided through Lynn McRae at Stanford University (now retired). The cost of the design work and, indeed, the cost of the first few t-shirts has been borne by Stanford. Lynn has indicated that 2020 was his last such contribution.

When we were overtaken by COVID-19 in 2020, the t-shirt design was already in progress and, absent an f2f conference, was used in conjunction with an on-line shop to offer swag for people to purchase themselves. If this is to be repeated in 2021 it will need a design commissioned well ahead of time.

## Day-to-day concerns

### **Administration**

Each of the five main conference days in 2020 was 'managed' by a facilitator. This person was responsible for delivering the day's (scripted) code of conduct address, reminding everyone that the webinar was being recorded, for managing the transitions between sessions and for managing any Q&A time - choosing and relaying questions from chat to the speaker.

Throughout the conference, a technical team was on hand to deal with any Zoom issues that may arise.

Sched was set up to deliver a daily reminder email to delegates and this replaced the daily email update that we have previously sent to them. There were a number of sessions (mainly social events using 'simple' Zoom) where we withheld the URL until the day. These needed adding into Sched early in the day.

### **Helpers**

*Needs someone else to do*

## And now that it's all over

### **Conference debrief**

As many as possible of the conference organizers, and any other members of the Steering Group not directly involved, should take part in a conference debrief as soon as possible. One or more of these people (the Community Manager? The Chair of the Program Committee?) should be tasked with updating this document in the light of a new year's experience.

### **Archiving**

As noted above, in 2020 we made a very determined effort to gather all the posters and slide packs before the event. Rather than adding them to the wiki as attachments, in 2020 they were added directly into the Samvera repository ([repo.samvera.org](http://repo.samvera.org)) and linked from the wiki to there.

The recordings from the main conference days need editing into individual sessions and adding to the Samvera YouTube channel. The 'related URL' field in the repository is then used to link them back to the slide pack works there. Using a timed offset to a 'whole-day' recording is not a very satisfactory alternative.

### **Conference survey**

It is likely that organizers will want to deploy a satisfaction survey to delegates. In the past, we have found it useful that the questions are identical, or at least very similar, to comparable surveys at past Connects so that comparisons can be drawn.

### **Follow-up emails**

Delegates should be sent a follow-up email after the event thanking them for their participation and contributions. The first message should include pointers to the program on the wiki (which will now have links to the slides, posters etc), the post-conference survey and a reminder of Samvera's website URL and mailing lists. A second message should be sent to encourage a few more contributions to the survey.