

satRday Neuchâtel → remote

Or how to turn an on-site conference into a remote conference in two weeks (not that you need two weeks for that...)

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SatRday Neuchâtel

<https://neuchatel2020.satrdays.org/>

Update

How SatRday Chicago organized their virtual conference:

https://docs.google.com/document/d/1qZn_TBxf2Rxi-TQF0ZmChWDPVm_vL_oCbH-AjE6Cig0/edit

Below is our personal guideline on how we moved in a short time from an on-site conference to a fully remote conference.

In addition, there are some other **great resources for (remote) conferencing** to consider.

- We used Emily Riederer's "good practices" for creating a [good environment for conference speakers](#) and tried to translate some points into remote conferencing.
- General advice to organise a conference: <https://discover-cookbook.numfocus.org/>
- [How To Run A Free Online Academic Conference](#) by people that organized <https://vickysteeves.gitlab.io/librarians-reproducibility/>.

We would also like to **acknowledge** the help of Stefanie Butland from rOpenSci for advising us on how to run a remote meeting efficiently and without losing touch with attendees.

1. Take the decision

Are you excited about the remote conference?

And - how *feasible* is it for you to move the on-site conference to a virtual space?

For the satRday Neuchâtel organizing committee our decision was quickly taken. We were in fact excited to move remote. Maybe because the whole planning phase had been ongoing remotely anyway and because we knew it would make the event more inclusive.

Tickets

You will also need to decide if and how you are going to re-price your tickets, and whether you will limit the number of tickets.

We decided to make the event free and limited the number of registration to 500 (the number of participants that we paid for at Zoom).

2. Inform everyone

Who to inform + in what order

If you have planned an on-site conference and you are moving remotely now, let the speakers and sponsors know first. Ask them if they are on board with speaking and sponsoring. Next, move to the attendees. Finally, inform the public and update your website.

Sponsors

Given that a remote conference is MUCH less costly, it is no problem if some sponsors decide to quit their engagement. However, a remote conference (at least in our case) reaches more attendees, so sponsors should actually be excited about that.

Communication

It is important that you inform both speakers and sponsors with the steps you are taking, e.g. the timeline, the tools you will be using, or even the time till you decide about a tool. Building trust is important for both parties in general, but even more so for a remote conference. See also Emily Riederer's "good practices" for creating a [good environment for conference speakers](#).

We emphasized to the speakers that no new tools were required (camera/microphone); a recent laptop would be enough.

3. Cancel all reservations

We had to cancel the venue, the catering and accommodation for speakers. We also decided to only stick to one sponsor (as mentioned above - remote conferencing is much cheaper!).

4. Explore remote conferencing solutions

Our wishlist

We did not simply want to stream the whole conference. Instead, we wanted to project the on-site experience - coffee breaks, Q&A's, networking - into the virtual space.

Trial and error

We knew that [Zoom](#) had [breakout rooms](#), so this would replace the networking and add some fun. And coffee breaks could be held in separate, extra rooms during the break. Q&A could be done with [Slido](#).

Then, one week before the conference, on a Sunday, we did a trial run with friends. They liked the breakout rooms, but the extra rooms did not work, Slido was not handy to use next to the Zoom meeting, and as hosts, we did not feel like we were in charge of the tools.

In the end we made a compromise - we opted for a [Zoom Webinar](#), along with four extra [meeting rooms](#)¹ for attendees to meet the speaker, and the Q&A integrated in the Zoom Webinar. Unfortunately, Zoom Webinar has no breakout rooms. Instead we used [Slack](#) to provide some sort of social interaction among the attendees.

Zoom Webinar

A Zoom Webinar gives the host much more control over the meeting than simply a Zoom meeting room. Attendees have no camera and are muted (unless unmuted by a host), but they can virtually raise their hands, interact in the chat and ask questions through the special Q&A panel.. Beside hosts there are also panelists (the speakers) that can have their camera on and the possibility to unmute themselves and share their screen.

	Zoom wording
Participant/attendee	Attendee
Speaker	Panelist
Organizer	Host

Because we were 6 co-organizers, we had 6 licenses, and therefore 5 extra rooms (but we used only 4 of them).

Costs

For Zoom we payed around 300 Euros (valid for 1 month) for:

¹ We call them Zoom "Rooms", but in Zoom speak they are actually Zoom Meetings. [Zoom Rooms](#) are yet another product.

- 6 licences (= 6 meeting rooms)
- Zoom Webinar for < 500 people

Alternative tools

We also tried [Hopin](#), but we felt that the application was not ready for a large one-day conference (some bugs). The idea behind Hopin seems great though!

5. Assemble your conference toolbox

We used [Zoom Webinar](#) as our main stage, and during the breaks 4 extra [meeting rooms](#) to meet the speakers from the previous session.

[Slack](#) was used as a parallel backup communication channel².

	Session 1	Break	Session 2	Lunch break	Session 3	Break	Session 4	Goodbye	Break	Debrief
Webinar	3 speakers		3 speakers		4 speakers		4 speakers			
Room A										
Room B										
Room C										
Room D										
Slack										

6. Get everyone familiar with the tools

We sent out the link to the Webinar³, the invite to Slack and some instructions first to the speakers. A few days later we sent out the information to the attendees.

We asked the speakers to arrange a meeting with their session chair to rehearse the stage protocol (unmuting, sharing screen, stop sharing the screen, muting).

² To go to one of the meet-the-speaker rooms, you had to leave Zoom Webinar, and when login in again, the chat was erased, so Slack became relevant.

³ We did not require any Zoom registration or password - something to reconsider for next time.

7. Rehearse

With Speaker

When scheduling a Zoom Webinar, you define a time from which the webinar officially starts. Before that time, the Webinar can be accessed with the same url to rehearse with speakers⁴ but not by the attendees even if they have the link.

[Here](#) is our checklist for the 1:1 meetings with the speakers.

We tested video and sound. If sound was not great, we asked them to put on a headset or move to a different room. If light was bad, we gave them tips to find better setup (e.g. higher camera with laptop stands, no windows behind them to avoid backlighting...).

Modern laptops usually have a good camera and good sound, no fancy new tool was required.

With test attendees

Additionally, we simulated a Webinar with colleagues (we simply scheduled an extra Webinar). This is important to see what functionalities the attendee has, and also to get as a host familiar with all the Zoom tools.

8. Anticipate failure

Put together a list of things that can go wrong, and how you can react.

For example: a speaker does not show up > pause the webinar for an extra coffee.

9. On the day of the conference

Where do organizers meet?

Even though the conference is remote, try to be in close proximity with your co-organizers. This proved essential for us - four out of six of us lost internet connection during the day, and sometimes things got lost on Slack and it was easier to just tap each other on the shoulder.

Each of us had their laptop set up in a corner or a room (when speaking).

When to start?

Be at the organizers venue 1 h earlier, so that speakers can join already and potential problems can be solved.

⁴ Took us some time to realize that we should have done the 1:1 meetings with the speakers directly in the Webinar. We first started rehearsing in a personal meeting room, but already the login to the webinar proved to be difficult.

How many attendees to expect

We had > 300 registrations and expected many no-shows because the event was free and virtual (and it was sunny that day in the Geneva area). In the end we still had 170 unique logins and never more than 100 people in the room at the same time.

Speakers are often curious to know the number of attendees in advance. It is important to tell them in advance that the count of attendees might be $\frac{1}{3}$ of the count of registrations: it is part of the game and doesn't mean that the talk is unsuccessful.

Roles

- Session chairing
- Live tweeting
- Watching the conference hashtag
- Watching Slack
- Watching Zoom Chat
- Watching email address
- Updating Speakers slides link
- Updating meet-the-speaker break rooms and matching co-organizers as moderators to it

We had four sessions, and for each one a different session chair.

One person took care of live tweeting for 3 sessions, another person for one session. Looking back, the job of live tweeting could be shared between two persons: one taking the screenshots while the other draft the tweet. It is worth allowing a slight delay to let the speaker make his/her point and get more coherent tweets.

Other people were simultaneously taking care of Slack and Zoom chat. We were 6 people and felt that this was a good number.

Monitor Zoom Webinar Problems

We had mainly two problems:

Panelists defined as attendee

Some of the speakers were defined as attendee and not panelist even if they logged in with the link we sent to them. Then they were not able to unmute themselves and turn on the camera. One of the host has to ["promote" them to panelist](#).

Panelists unable to ask questions

This looks like a current bug/missing feature in Zoom: panelist cannot use the Q&A. In the meantime, remind them to send them to the chair via chat.

Spotlight video

Unlike in Zoom Room the spotlight video does not change automatically from the chair to the speaker during the session. One of the hosts has to take care of that and change the speaker's spotlight video at the beginning of their talk.

Time keeping

Sticking to the schedule is important for people dialing in for a particular talk.

Announcing meet-the-speaker rooms

During the breaks, one of us hosts would share a slide with the time when we would meet again and the links to the rooms. One or two hosts need to stay in the webinar. Otherwise, the webinar stops.

Each speaker from the previous session had their room and one of us hosts would join to moderate the questions.

Remember that the person sharing the slide with information about meet-the-speaker rooms in the main room should be one of the persons staying in the room for the whole break. We made the mistake of having the chair of the track share the slide, but the chair was also a moderator in one meet-the-speaker room so the main room was left without an informative slide when he had to go.

Moderating meet-the-speaker rooms

Take notes of the questions that could not be covered in the main room so you can reuse them as ice-breakers in the meet-the-speaker rooms. Also note the name of the question's authors: there are good chances that they will join the room and offering them to ask their question in person is a nice gesture.

People can be shy and it can happen that the meet-the-speaker rooms go very quiet. As a moderator prepare for the "worst", meaning 10 minutes of you talking to the speaker and everybody else just listening. This doesn't have to be an unpleasant experience if the speaker talked about something you have an interest in, rather a great opportunity to have an interesting chat.

It can also be good to start the break with an explanation that these rooms are a bit of an "experiment" and "we will see how it goes": anything so that speakers don't feel like the pressure is on them. That being said, we had some great interactions and usually a very good time in the rooms.

Debrief

After the last meet-the-speaker session, hosts and panelists met up in the webinar and had a discussion on what went well and what could be improved.

This was important for feedback, but also to have a relaxed interaction with the speakers after an intense day.

10. After the conference

If you recorded your Zoom webinar, view the recording. Share it with the speakers and then start the editing of the file.

Get feedback from speakers and attendees (this can be a free text form, but should allow anonymous feedback).

11. Done better

Many things could be improved (especially if we would have had more time to plan), but we feel three topics deserve special mention:

Q&A tool

We did not get that many questions in the Q&A tool in Zoom. And Speakers could not use that tool either, only attendees. We are not sure how to improve this though.

A more dedicated tool, like Slido, could maybe help, but it comes at the cost of adding one more tool to your already busy attendees.

Reexplaining quickly how zoom Q&A works every two or three talks could have already gone a long way.

Interaction

Although the chat function in Zoom was used at times, we felt that there was little interaction between attendees. Breakout rooms could help with that.

Registration

We kept the registration through ti.to, but moving to the webinar registration or a link with a password might prevent from too many logins (since webinars are restricted to the number of people you paid for).