How to Organise & Run Online Events

Online meetings have many advantages – think no long train journeys and station coffee, or even more importantly it shows we don't need to commute or take business trips, which are both contributors to the climate crisis. Added to this, virtual conferences can be much bigger and inclusive with people from all over the world joining in. This is a brief guide for those that want to but are a bit hesitant in using online platforms.

Community Energy England has created this document based on our recent learning after hosting events online. This is a basic guide for what to consider, which we hope may make the process easier for you. Community Energy England has always used Zoom and would encourage other organisations to do so, simply because it is what people seem to be most familiar with after it came to dominate lockdown communications. Other platforms exist but we have not used them for our own events.

Overview of tasks in order of priority

This is an overview of the tasks you should be doing and preparing for.

- Set a date.
- Create and agenda and approach speakers.
- Create somewhere people can register (Eventbrite is recommended).
- Promote your event on social media and newsletters.
- Submit your event to the [Community Energy England website](#).
- Decide how many people you need to help run the event and make sure everyone knows their roles on the day.

- On the day of the event share details of how people can join.
- Send a follow up email to attendees with presentations and thinking points from the event.

Zoom

Zoom (basic) is free and this allows a 40-minute meeting with up to 100 people. Premium costs £11.99 a month and allows 100 participants, the convenor to mute individual/all participants and no time limit on the length of your event.

To download Zoom go here. Once downloaded/installed, open the application and on the top right you will find the option to **host a meeting.** This will produce a meeting URL (website link) which you then share with the people you want to meet with. People who click on the link can access the meeting through the app on their computer/device but if they can't or don't want to install Zoom, they can join via the URL through an internet browser.

As well as a unique URL, each Zoom meeting has a unique 9, 10, or 11-digit number called a meeting ID that participants can use to join instead of clicking the URL. It is good practice to also require a passcode to access the meeting. Instructions can be sent with the URL/meeting ID when you give them to participants. People will have the choice whether to sign in to Zoom or just join the meeting without doing so if they do not have a Zoom account – it can be useful to mention this in case people are unsure about getting a Zoom account (although it's free to do so).

For added accessibility people can join the meeting by phone, instructions on how can be found here.

For those with a need for increased security, Zoom can be encrypted but this has to be turned on in the settings and requires turning off access by phone.

For those that want to jazz up their experience they can add a sunny/mountainous etc. background. Details on how to do this effectively are here.

Preparing speakers

If possible, it is advisable to do a trial run of Zoom with speakers to get them comfortable with the software.

Advise speakers that if using PowerPoint to display slides, they may want to go to "slideshow set up" and select "browse as an individual" so when they go into presenter view it does not take up their entire screen, instead only one window which they can share on Zoom and still access other things on their computer at the same time.

All speakers should be prepared for internet connection issues and we recommend asking speakers to be ready to speak earlier than planned in their session if another speaker has a connection issue at their allocated time.

Try to get presentations from speakers in advance. If they have connection issues, you can share for them. You can also suggest speakers turn off their camera if the connection issues persist.

Prior to the meeting you may also want to let people know to sit in a well-lit area that is quiet and use headphones if possible.

Hand Signals

On Zoom there is a slight lag and as online discussions are not face-to-face, we miss many non-verbal cues. Therefore, to facilitate an open but participatory meeting you can use hand signals and/or the chat box – it is a good idea to send these to participants before the event but also remind participants at the start of the event itself.

Especially for small meetings (4-10 people), hand signals can be very effective. The most commonly used are below, and of course you could add to these.

CAST Hand gestures

I agree: jazz hands facing upward (see it in action)

I disagree: jazz hands facing downward

I'm unsure/ don't mind: hold hand up vertically and tilt side to side

I want to speak/ I have a point: hand raised, index finger pointing upwards (see it in action)

I have a point that follows on directly from the last speaker's point: both hands raised, with index fingers pointing upwards

I have a technical point (eg. 'we're short on time', or 'I need to leave'): index fingers on both hands forming a T

Chat box

Zoom meetings include a chat box, where participants can type messages to other people within a meeting. You can send a private message to an individual user, or you can send a message to an entire group. As the host, you can choose who the

participants can chat with or to disable chat entirely. In-meeting chat can be saved manually or automatically.

You can set up a text code similar to the hand gestures above to use in the chat box. The facilitator can use these to observe how the meeting is going and maybe field questions.

- I support this: +++
- I don't like it: ---
- I'd like to speak: *
- I'd like to make a direct point: d* (this means that you jump the queue so that you can respond directly to what the previous person was saying. This way we can end conversations before moving to a new point).
- I have a question: ?
- I don't understand, please repeat/translate: ????

There is also the option to use the text box for questions to deal with at the end. This may require a dedicated Q+A person for bigger meetings to keep track of all the questions that get asked because they will be mixed in with other comments and discussion.

However you use the chat box, **be sure to make this clear at the beginning for all.**

Breakout Rooms

You can create "breakout rooms" on Zoom. These can be an excellent way to split an event and encourage small discussions, then reconvene. Information on how to do this can be found [here](.).

Ideally, ask participants in advance, perhaps when they register for the event, what breakout sessions they will want to attend (so you have these choices linked to the email address and name that they will be signing into the event) – with this information you can prepare which room they will go into in advance. It is likely that in the event some people will change their mind and wish to choose a different room so be prepared to move people around (only the [Zoom Host](.) can do this).

For the sake of a smooth event, it may be easier to randomise how breakout rooms are split. Breakout rooms are managed in the event settings on the Zoom website and initiated in the Zoom application.

If you want to record the breakout sessions, then be aware if you are doing this online (using a cloud service) the recording will stay in the main room or if on a convenor's computer will follow them to whichever room they go to.

Additional considerations for your event

In addition to everything else covered in this document, it is worth considering the following points as these small factors can have a big impact on your event.

- Consider Zoom fatigue – too long of an event can be very tiring for participants.
- Take regular breaks – staring at a screen and sitting is not healthy in long periods. Some people even incorporate exercise activities and games to add some movement and variety.
- It is recommended that you record the event so you can share afterwards via YouTube with people who could not attend. You can do this [on your computer](#) or to [the cloud](#). You can also live stream the event on Facebook or YouTube to reach even more people. Make sure when you send joining instructions to participants that you state clearly the event will be recorded and may be made public (or confirm it won't be if you want the event to be confidential).
- Consider what settings you wish to have in place for your event. Do you want participants' microphones to muted when they enter for instance? Do you want the event to automatically record or someone to manually start the recording? All settings can be edited on an event-by-event basis through the Zoom website.
- For smaller meetings it is a good idea to do a welcome round before starting just to break ice and help conversation flow, as the distance and technological aspects can make it seem a bit cold.
- Remember that being on a computer removes a large amount of non-verbal communication, so be sure to explain things carefully, don't assume knowledge and don't use acronyms.
- For anything above one-to-one meetings, muting yourself when you are not speaking is best practice as even typing can disrupt an online meeting and background noise that you may tune out or not control can also be disruptive.
- You can ask questions for a poll. These are prepared in the event on the website and then ready to be triggered at will in the Zoom application. You can add new poll questions via the website during the event that are immediately available.
- Don't share the Zoom link publicly. Send it just before the event to people who sign up so to minimise the opportunity for people on the internet who may wish to cause a nuisance. It has happened.

- Zoom meetings have one "host" with the most control, but you can also assign co-hosts who are able to help with things like muting participants. We advise having a few people from your organisation set up as co-hosts for the event with distinct roles. Make sure these people know what they need to do and how to do it before the event.
    - Chair – to introduce and steer the event
    - Zoom driver – to ensure the correct people are "spotlighted", to mute people when necessary, to keep an eye on the chat and kick out anyone who is posting inappropriate comments.
    - Q+A curator – someone who can be looking at the chat box and saving questions which the chair can ask speakers in a Q+A.
- It is worth having a dedicated notetaker who is taking notes on a shared document (Google Docs or OneNote) which other members of the team have access to and can contribute to.
- For a more detailed guide written for the COVID 19 crisis and generally aimed at educators go here.

Advice for participants

The following points could be shared in advance of your event along with other instructions such as the hand gestures and other information specific to your event. The more prepared your participants are, the more smoothly the event will run.

- "For the best experience, sign up, download and install Zoom. You can do this on a computer and or phone, but a computer / laptop will give you much more functionality.
- For security reasons, we will share the joining link on the morning of the event. We ask that you join the call 10 minutes before the conference starts. If you need to do other things throughout the day, we advise you mute Zoom and turn your mic off camera off.
- We advise being somewhere with a robust internet connection. Consider your proximity to the wifi router, if you can plug into the router with a wire, if anyone else in your house is streaming TV or doing other video calls. All of these things will have an impact on your connection, and your experience of the conference."

We hope this guide is useful and we are happy to discuss with our members how to make their events more engaging.