VIRTUAL CONFERENCE PLANNING GUIDE

Background and information needed for preparing and delivering your conference or meeting online

A virtual conference gives you the opportunity to reimagine an event to provide high-quality professional development for your community.

Virtual conferencing connects people through an **online** community before, during, and after an event.

Produced by ACTE rev. 5-31-2020

Table of Contents

Special Thanks –

To the team at ACTE who produced their first virtual event, the 2020 ACTE/Iowa WBL Work-based Learning Conference on April 22, 2020, led by a team headed by Kelli Diemer, WBL Consultant, Lauren Fillebrown, Partnerships Special Projects Coordinator and the many other staff, volunteers, presenters and attendees who made the event successful. Appreciation to Dr. Steve Klein of Education Northwest for sharing his suggestions on how to enhance the virtual conference experience.

-   **April 26, 2020 - ACTE**

Executive Summary

The Association for Career and Technical Education (ACTE) has produced this planning guide to assist our affiliated organizations in better understand the process of developing and hosting their own virtual conferences. To be sure, CTE Associations have ample expertise in planning for and delivering in-person conferences. While some of the tasks involved in both virtual and in-person events are similar (e.g. registration, promotion, recruiting presenters, scheduling, contracting with vendors, exhibitors and sponsors) there are many that are not. The need to prepare for a first-time virtual conference means you will be learning how to produce the event, as you are actually creating it.

For your virtual conference, this planning guide will assist you with your preparations. While this guide focuses on the actions you will need to perform if you are self-producing a virtual conference, these same actions will need to be performed by you and a turn-key conference vendor should you decide that is the best option to produce your virtual event. Therein, this planning guide should also be helpful in your selection and management of a turn-key conference provider.

You can view a recording of an accompanying presentation about this guide at
https://tinyurl.com/acte-virtual

Introduction

While there is no way to precisely replace the immersive experience of an in-person conference, this planning guide can assist your CTE Association in planning for and delivering a virtual conference while effectively supporting the expectations of attendees, presenters and sponsors. A well-designed virtual conference can actually be more engaging and useful than an in-person event.

In some instances, you may wish to seek a vendor or partner who can assist with the technical aspects of the conference. There are a growing number of commercial entities that provide such services at varying levels of support and pricing (**See Attachment A:** Virtual Conference Vendor List). As an alternative, ACTE has partnered with our online learning provider for CTE Learn to support the development of asynchronous virtual conferences at no-cost to our unified states (**See Attachment B**: **CTE Learn | ACTE Online Learning Network Virtual Conference Service).** However, that does not mean you aren't responsible for the same coordination roles you typically have but would rely on ACTE to handle the technical aspects of your asynchronous virtual conference.

There are some basic questions that you must consider before embarking on preparing for and delivering a virtual conference. Those include:
- How much time and personnel resource will planning and conducting such an event require?
- Is our audience ready to participate in a virtual event?
- Should the event be synchronous, asynchronous or a mix of these delivery modes?
- If planning for an in-person event, but unsure of whether that will be held or not, how do I prepare for both, simultaneously?

- What will a virtual event cost and what is the revenue potential from attendees and supporters (e.g. Exhibitors & Sponsors)?
- If I need assistance (from a commercial vendor) in preparing for and hosting the virtual event, how much will it cost and what will my responsibilities be?

Ultimately a successful virtual conference has prepared participants, built-in interactivity, and is delivered effectively by the host(s). The following are recommendations for what to do before, during, and after a virtual conference, as well as tips for engaging your virtual audience.

Plan for Success

Thoughtful consideration needs to be given to how content is packaged. <u>Your virtual conference should not be a presenter talking into a web camera for a 50-minute session.</u> The most important part of your planning process should begin with the development of a list and timeline of all of the known tasks that will be required to develop and deliver your conference (**See Attachment C: Virtual Conference Tasks & Timeline**). Here are some strategies to help you plan for an engaging event:

- *Organize your meeting agenda for virtual delivery*

    - A virtual meeting should not be an exact replication of what you would do for an in-person conference. Scheduling of sessions should be spaced apart, and generally between 30-45 minutes each.

- *A virtual conference does not need to take place in a single day*

    - You can break the meeting into smaller sessions combining live and asynchronous content delivery. Stretch meetings over multiple days and hold some sessions at off-hours to accommodate attendees who are at home parenting. Deconstruct your meeting agenda and consider how sessions might be configured differently which lend themselves to different approaches.

- *Pair presenters with an instructional designer*

    - Presenters may tend to overfill slides with content, lack pacing, and default to a sit-and-git approach. To make presentations useful, pair a presenter with an instructional designer who understands best practices in adult learning. This might be a curriculum developer or an adult educator who has such design experience. Have the two meet for a short 15-minute call to discuss session goals, review content, and consider different strategies to present information. Then have the presenter draft and share a slide deck with the designer. The two can then iterate to achieve a more compelling presentation. This could be accomplished overall in about one-hour per presenter. The result will be crisp, targeted, well-organized content.

- *Train presenters on the platform that will be used for the virtual event*

    - Sessions should make use of chat, polling, Q&A, breakout rooms, and other strategies to actively engage participants. This requires working with presenters to help them understand the platform and its capabilities so that they use the right tool in the right way.

- o *Pair presenters with session support*
  - Presenters need to focus on delivering content. Assign a technology support person to each session to launch the event, monitor chats, run polls and breakout sessions, mute participants with background noise, provide real-time TA, and run an end-of-session evaluation. Having a live technical support person ensures the session will progress with minimal distraction to the presenter.
- o *Create a session web presence*
  - Design and cultivate an online webpage for your event. Use it to share agendas, compile presentations, and post information submitted by attendees. Make it a virtual learning hub where people can go—before, during, and after the event—for content and ideas.

For additional ideas to plan for your virtual conference success, please see the [Facilitators Virtual Guide](#) created by Vivayic.

Technology Tools

Beyond investigating possible technology providers (platforms and hosts) to help you prepare for and host your virtual conference, there are many options available to you to assist in your planning, preparation and delivering your virtual conference.

Perhaps the most immediately available (and valuable) tool that you will use is Google Docs and Google Drive. If you have an alternative collaborative workspace that is accessible by your planning team (e.g. Dropbox, Microsoft Teams, Slack, etc.) then you're all set. If not then you will discover that the success of your conference depends heavily upon sharing critical documents widely with your team. These may include your:

- Call for Proposals through a Google Forms
- Conference schedule through a Google Doc
- Session Descriptions (including presenter bio, photo, accompany resources) through Google Forms
- Pre-recorded Sessions through Google Drive
- Conference Presentations through Google Slides
- Other program resources (e.g. handouts, copies of presenter PowerPoints, etc.) and training materials for room hosts and your tech support team through Google Docs or Google Sheets.

Other tools that you might want to explore their use in your planning and delivery of the conference could include:

- [Every Time Zone](#) has a slider that allows you to see what time it is across time zones.
- [World Clock Meeting Planner](#) allows you to input your team members' different locations and then creates a table of suggested meeting times.
- [Doodle](#) has a scheduling tool that allows you to create polls with potential meeting times with your planning team, room hosts, etc.

- [Slack](#) is an instant messaging and collaborative tool that when using the desktop client version allows you quick and immediate access to team members. It includes a virtual meeting (the free version has a 1:1 capability; the paid plan permits conferencing of up to 12 people), file sharing and in-app connectivity to launch Google Doc/Drive sites). Having such a tool for the day-of-the-conference is extremely important!
- [Free Conference Call](#) is exactly that; a multi-person (up to 50 callers) conference bridge that you can use with your planning team at no cost. Having a conference bridge open for your Tech Support team on the day-of-the-conference is extremely important!
- [Wheel-of-Names](#) allows you to enter all attendee names to display a random selection process for conference door prizes/drawings.
- [ChatRoll](#) is a real-time chat platform that can be embedded within your website and/or app and customized to match your brand. Chatroll's scalable technology and management tools support organizations of all sizes.
- [EventCreate](#) allows you to use their templated conference services to create your day-of-event page that includes your schedule and other features of your conference. Optional registration services are available. See sample [ACTE Work-based Learning Conference](#) site.
- [Loom](#) is a platform that allows you to make quick videos using a lightning-fast video recorder capable of capturing your screen, webcam, and microphone.
- [ClipChamp](#) offers a range of online video tools to help you edit, convert, compress or record **videos**, or on your website, to collect videos from your site users. Their editor and converter products **don't require software installation** – you simply sign in on our site to create a **free account** and start working with your videos **straight away** in your web browser.
- [Microsoft PowerPoint](#) if your computer has a sound card, microphone, and speakers, and (optionally) a webcam, you **can record your PowerPoint presentation** and **capture** narrations, slide timings, and ink gestures your presenters can use in recording their presentation videos.
- [MailChimp](#) offers a free email Marketing Tool that provides you up to 2,000 contacts and 10,000 monthly message sends. In addition to a high delivery rate you can access their free templates, a Drag & Drop editor and their Advanced Analytics
- [Rev](#)-Affordable transcription, closed captioning and sub-titling services for videos

Technology Issues

Once you've selected your platform or provider, it will be extremely important that you plan to test it; with your room hosts, your presenters and even your attendees, in advance of the day of your event.

If you have a large event, you will want to consider hosting a 'Test Day' a few days prior to the virtual conference to allow your attendees the chance to use their computers to connect to the site that you'll be hosting the day-of conference at. This typically involves providing a basic home page for your event (that does not feature the links to all of your programming) but provides registered attendees to connect to a meeting room where your Tech Team can greet and confirm that they have successfully reached the Virtual Conference room. You will also need to be sure that attendees know who to contact if they're experiencing issues in establishing that connection that day (and again on the day-of your virtual conference).

On the day-of your virtual conference, you will want to have a Tech Support Team actively involved in supporting attendees who are experiencing difficulties in participating in the conference. Among the most frequent issues you'll encounter could be:

- Registered attendee did not receive log-on information or they have forgotten/lost their log-on credentials
- Attendee's password not working (needs to be reset)
- Attendee computer or web browser is not functioning properly
- Attendee is not able to hear presentations or video is unusable

It is highly recommended that you envision these (and other) types of issues arising and prepare your Tech Support Team to be able to respond quickly to them. We recommend that you use a conference bridge for your Tech Support Team to be connected at minimum during the lead-up and start of your virtual conference but to be staffed throughout the day for additional issues that may arise. We also suggest the use of an instant messaging service for the entire Tech Team to be set up to use so that there are alternate paths for messaging beyond the conference bridge.

Of special note; the old adage: plan for the worst, and hope for the best will help you be best prepared. Should you be able to have a back-up web site for the day-of your conference schedule/agenda and programming you would be able to easily and quickly alert attendees should they experience technical issues that prevent them from participating. Having eblasts pre-written with instructions on where to connect to the conference, how to reset passwords or to be directed to a back-up conference site are valuable time savers for your Tech Support Team when issues arise.

Finally, by planning on recording the entire virtual conference proceedings, you can always alert your attendees if they are unable to join that day, that you will be making the full conference available afterwards.

Special Features

Like your in-person conferences you may be asked to provide special accommodations such as hearing or visual assistance for attendees. You'll want to be sure that your platform and/or provider is ADA Section 508 compliant. This law requires that your website content be accessible to people with disabilities. While most platforms are basically compliant in that they will work with resident tools for accessibility for the visually impaired, those with auditory issues may require closed-captioning or transcripts of the presentations in your general and pre-recorded sessions. ACTE is happy to share additional information about tools and services that provide solutions to these needs.

To know if these solutions are required for your virtual conference you will want to be sure to alert potential attendees to communicate their needs for accessibility to you. Adding a statement to your promotional or registration sites that asks this question "Will you need special accommodations to participate in the virtual conference" that initiates this conversation is encouraged.

Security and Privacy Issues

Like your in-person events, planners need to be sure that only authorized attendees are able to access your conference, and if issues arise about behavior of attendees, you can remedy them quickly and without an impact on the conference.

Much has been written recently about issues of interlopers, persons who are not registered, attending virtual events and in some extreme cases, disrupting sessions (e.g. 'Zoombombing'). At the same time, a virtual event might present the opportunity for those registered for the conference to share their log-in information/credentials with others who are not registered to attend.

And of course the ongoing commitment to privacy and protection of information about attendees is an ongoing concern among our audiences.

The most basic part of providing security for your event, is to ensure that there is a **robust password/authentication** process in place. More advanced systems can provide authentication with your Associations' Customer Relationship Management (CRM) system (database of members) and offer 2-step protection (e.g. authentication with your CRM and a unique password created for each attendee). These features and functionalities vary by platform and system and pricing. They should be a consideration in your selection of your platform and or provider.

Every virtual conference platform offers a variety of tools that can be deployed at varying levels that can restrict attendees from actions such as preventing the use of microphones and/or cameras, use of an accompanying chat feature, or blocking them from entering specific sessions or meeting rooms. Some platforms allow the room hosts to remove specific participants from their rooms.

Knowing what these features and functions are for your platform is the first step in ensuring you have a plan to address any concerns your attendees might have. Informing your planning and Tech Support teams, your room hosts and your presenters in the tools and how to use them is a basic part of the training and instructions you need to provide to them.

Finally, encouraging your attendees to share some basic personal information such as their names on screen, photos in their profiles and video cameras, should be a part of your communications with them. However this should be presented as an option, and explained as a way for them, and other participants, to get more out of the virtual conference and the networking opportunities it provides.

Programming (Format)

Presenting your programming in a format that is easy for presenters and attendees to adapt to, allowing for interaction and that provides a good experience for all is the goal for your virtual conference. An important step in in transferring the concept of breakout sessions and keynote speakers that would normally be held in physical rooms to virtual rooms.

Think of each virtual room as a unique webinar room. Each virtual room will be accompanied by its own host. Similar to physical rooms, hosts who would have otherwise helped with the projector and microphone will now play the same roll administering the Zoom meeting.

You will need to consider if you want to record all the sessions, perhaps this would be seen as a bonus in the eyes of attendees. Hosts need to know how to do this, and as importantly, how to share their recordings with you for after-conference review/distribution. Most virtual conference platforms provide a chat feature for comments and questions from participants. Be sure to capture those as well so that they can be shared after the event.

Your general sessions can still feature many of the normal attributes from an in-person conference including presentation of colors, reciting the pledge, recognizing VIP attendees, sponsors and exhibitors. Keep in mind that you do not have your audience held captive; so think of ways to condense what is traditionally done in-person to be more succinct in those remarks. Consider slides or short videos by those who you would normally ask to deliver remarks. Use the chat feature to share sponsor and exhibitor sites (especially if you have a virtual exhibit hall for your conference).

For smaller conferences of about 100 attendees you might want to consider using conferencing platform features such as break-out rooms to send attendees to conduct a brief, get to know each other activity, that replicates the ad-hoc networking of an in-person event. Doing this is not by-chance; you will need to carefully plan, schedule and communicate this to attendees to prepare them for, and ensure it as a successful feature of your conference. Perhaps breaking your audience into smaller group sizes to allow them the opportunity to introduce one another and respond to an initial 'get to know about you' question could be done for the first 10 minutes of a general session.

Room Hosts and Room Technicians

Room Hosts and Room Technicians have a specific set of responsibilities to ensure a productive session. These tasks need to be addressed in each concurrent session meeting room. For more informal presentations, these responsibilities can be combined into one role, as a Room Host & Technician. For more complex presentations, those that might require using multiple media and switching between sources, it is suggested that these roles be separated into two, by having a Room Host AND a Room Technician. Whichever format you use, the steps they follow are to ensure that the presenter is not burdened with the technology side and to support all attendees so they can successfully network virtually and/or ask questions. In a hybrid environment, the Host or Technician will be responsible for running the video and ensuring that the presenter is available to respond to questions either via video or a chat feature.

The role of the room host, as previously described, can extend beyond just the moderator role common to in-person events. Consequently it is important to consider the support and/or training that needs to be provided to them to ensure their, and ultimately their sessions, success. Training of Room Hosts and/or Technicians should include providing them with very detailed instructions, even a timed script, to help them follow along, and if possible, a practice session where they perform the exact steps that will be required of them during the actual event. It is also strongly encouraged that in providing the Room Hosts/Technicians with detailed

information that it be provided in whole as opposed to a stream of information or communication at different stages.

Room Hosts/Technicians should NOT be the presenter at their own session. It has been documented that combining all of these tasks and assuming the role of presenter increases the potential for technical challenges and/or missed communications with attendees.

You should also provide Room Hosts/Technicians with tips for troubleshooting. Common issues that have occurred during recent events include the following:

- Muting of participant microphones needs to be performed in each concurrent session. It is not 'set once' for the entire event.
- Omitting instructions to participants on session etiquette, such as when to ask questions in the Chat area
- Informing attendees where to go (click) following the conclusion of the session
- Forgetting to start/stop recording the session
- Addressing what Hosts/Technicians should do if the session runs longer than scheduled
- Complications from using a 'waiting room' creating delays in moving participants into the session

These and other unexpected incidents can lead to confusion during the session and undermine the polished environment you want to create for attendees and the presenter. You will want to try and forecast by testing and troubleshooting prior to the event, to prepare your Room Hosts/Technicians to handle such occurrences quickly and directly. Having a Technician in the room who can reach out to your Tech Support should other unforeseen glitches occur, frees up the Host and/or Presenter to continue as planned while these other issues are resolved.

Components of Virtual Conferences

Model good virtual instruction—Educators attending the conference are expecting to hear content. While delivering this is a paramount goal, you have an opportunity to model best practice in virtual instruction. Ideally, educators will leave the event not only with a better understanding of CTE issues, but also new strategies, platforms, and tools for teaching online. Specific components you might want to consider including in your virtual conference include:

- o *Focused presentation*—have presenters pre-record their session (ideally no more than a 25-minute video) then during the session have attendees submit discussion questions via a chat feature or following viewing of the video. The goal is for presenters to be able to engage in discourse with attendees. A session might start with a 3-minute overview by the room host of key points, followed by viewing the pre-recorded video and either during or immediately after, have the presenter start with a response to a relevant question (to get things rolling), after which a moderated discussion could ensure.

- o *White boarding*—following a short presentation around a problem of practice, attendees engage in a white boarding exercise where they type in possible challenges or solutions to a given issue. People may propose their own ideas and/or comment on others' posts. This can be followed by a discussion of themes and a group dialogue.

- *Breakout rooms*—after listening to a short presentation, participants could be paired into groups which meet in virtual breakout rooms to discuss a problem and report back to the group on their conversations.

- *Creating video presentations*—there are free software packages, that allow people to video record a walk-through or take photos of objects on their screen (See next section on Technology Tools). A presenter might offer content offline, such as a vexing problem of practice, and ask people to pre-record or develop a 15-second presentation of their own ideas. Then people could meet to share what they developed. This could be a powerful way of sharing interesting ideas being used in the field.

- *First-timer session*-While it's likely that all of your attendees at your first virtual conference will be 'first timers' think of including this as a session in your virtual conference as a buffer before your programming begins (gives everyone a chance to connect and make sure that they are situated for the conference) and use it as an opportunity to explain the format of the day and to share any technical instructions that will enhance their experience.

- *It's just lunch*—one benefit of in-person meetings is the chance to make new connections. In a virtual conference you could randomly pair (or by job-alike categories) attendees in groups of 2-4 to meet for a lunch session or social reception at the end of the day (people can indicate their preference when registering). People are given conversation starters and then talk with one another to share ideas and brainstorm solutions.

- *Sticky notes*—a variation in white boarding, individuals write ideas on notes that can be electronically posted and moved around on the screen. This activity can be interspersed with presentations and discussions. This approach has been used during in-person meetings and translates well to a virtual environment.

Sponsors and Exhibitors

If sponsors and exhibitors are a part of your in-person conferences, they should be a part of your virtual ones as well. These companies and organizations want (and need) to be in front of your stakeholders so you need to purposefully plan on how best to include them in meaningful ways within your planning and delivery of your virtual conference.

The first step is to envision several foundational ways that you can include them in your event. Certainly, the traditional avenues such as sharing their logos and company information on your conference promotional materials, schedules and attendee communications needs to be included.

Exhibitors are interested in learning how going online can benefit them more than a traditional event. Among the basic considerations you'll want to address before discussing/recruiting exhibitors and sponsors are how you will:

- Create a virtual exhibit hall that would feature information about their company/organization, showcase of their products & services, contact information, a short video presentation and the possibility of a live chat feature for them to interact with attendees (See Techniques and Tools section for a possible solution)

- o Enhance interaction and boost engagement with customers by using live chat tools and webinars
- o Provide attendees with the option to download content in the form of documents, presentations and videos. This way exhibitors/sponsors will be able to monitor their booth and regulate available content in real-time
- o Allow exhibitors/sponsors the ability to customize their booths without the hassle or expense of design services
- o Coordinate the information required to build the virtual exhibit space and ensure your exhibitors/sponsors are actively engaged in the process
- o Evaluate booth performance and be able to provide detailed reports consisting of data such as the number of participants, booth visits & sources driving the audience to the event

Other ideas could involve:

- Schedule a specific time slot/session slot for attendees to visit a virtual exhibit hall
- Invite key sponsors to share a 1-2 minute video or deliver remarks in the general or breakout sessions
- Incentivize attendees to visit the virtual exhibit hall with drawings or 'passport' activities
- Asking exhibitors to share a promotional and novelty item to package them together and mail to each registered attendee (special consideration could be given to exhibitors/vendors who connect mailed item with a synchronous activity done in the Virtual Exhibit Hall
- Announce sponsors and exhibitors in general sessions
- Placing a 1-minute video from exhibitors in a specific number of the concurrent session rooms for the Host to playback
- Ask the exhibitor/sponsor what would be valuable to them in participating in the virtual conference. They may have great ideas that you can monetize and provide to them.
- Consider offering sponsor/exhibitors the opportunity for co-branded paid digital advertising as a value-add. These packages would provide a certain number of digital ads in the name of the sponsor/exhibitor, but with a message of promoting their support for, and ultimately for attending, the conference. These ads could be purchased in bulk by a third-party provider or directly through services like Google (Ad Words), Facebook or Amazon.

One more concept that is worth exploring for your conference is retargeting, also known as remarketing. Retargeting is a form of online advertising that can help keep your sponsor/exhibitor's brand in front of bounced traffic after they leave your conference website. For most websites, only 2% of web traffic converts on the first visit. Retargeting is a tool designed to help companies reach the 98% of users who don't convert right away.

Retargeting is a cookie-based technology that uses simple Javascript code to anonymously 'follow' your audience all over the Web. You can learn more about this form of promotion from Retargeter.

Communications

The <u>single most important component</u> of your planning, preparing and delivery of a virtual event is to <u>be fully communicative</u> with your planning team, your presenters, your sponsors & exhibitors, your Tech Support Team and of course your attendees.

Regular communications should begin at the outset of our planning to share the roles and expectations of each party. If this is your first virtual event, we recommend including as many of your team in a kick-off meeting to share the outline of the plan and roles that have been identified for each individual. At the outset having a clear understating of who does what is important, but so is flexibility. Members of your team, or those who may join it later, may bring special talents that could be leveraged on identified tasks, or those that might surface later. For instance if a team member has particularly strong tech skills, they may want to be a part of your Tech Support team, or perhaps be assigned to assist presenters with the development/recording of their sessions.

Communicating with sponsors and exhibitors will also require additional time and resource. Virtual conferencing is likely still very new to them and they need to understand not just the value of their participating, but how they will be expected to provide information and assistance to your attendees. As mentioned earlier, don't forget to ask them for their ideas and suggestions on how they feel they will get the most value from participating in your virtual conference.

Communications with your presenters begins when you inform them of your intent to deliver the conference virtually. By having a well-thought out plan to work with presenters to successfully deliver their sessions is of foremost importance. Letting them know how they will be asked to conduct their presentation, guidelines for them preparing it need to be developed and shared in writing, including length of session (especially if it differs from prior communications you've had with them), the format for their presentation (pre-recorded video, live presentation, live chat, etc.) and technology support to help them prepare their presentation or on the day of the event from the room host or Tech Support Team. Ideally you will have an example of the type of the session you're asking them to deliver to share so that they can this as a model.

With potential attendees, your promotional efforts need to emphasize that your conference is being held virtually, and the format that you'll use (e.g. synchronous, asynchronous or hybrid). It will be especially important to promote the interactive elements you have planned; ability to interact with presenters or exhibitors; general session speaker Q-A, polling, etc.

Communicating with attendees is not the same as you would at your-in person events. Since there is no 'physical presence' you are completely dependent on the technology to support these communications. So you need to plan to communicate more often and in different ways with your registered attendees. Some ideas for doing this include:

- Consider short video messages from the conference chair, yourself or even your keynote speakers directed to attendees with important information for them (eg. Features of, or how to participate in the conference, Test Day or Day-Of instructions, post-conference communications

- Consider creating a 'Tips for Participating' document that can be hosted on your conference promotional page, or emailed to attendees that helps prepare them for what the day will bring. See https://www.acteonline.org/tips-for-attending-a-virtual-conference/ for an example.
- Alternate email communications. You might not have all of the latest email addresses for your attendees in your database. Or your attendees may not be able to receive emails from your bulk mail provider (or your own personal email if you're sending bulk messages). Some web mail servers detect when a group message is sent to multiple people (more than 25) and will filter its delivery. To ensure that your communications are getting delivered (and read) by your attendees, plan on using alternate communication systems like MailChimp or SendinBlue.
- If you've recorded the virtual conference, you can provide instructions on how to access it, upon completion of a post-conference survey that you inform the attendees is the process, and that will be coming to them. This way you can increase your conference evaluation participation.

Expenses and Pricing

A virtual conference can be offered as a more affordable option for attendees as many of the in-person expenses aren't needed (e.g. Food & Beverage, facility rental, audio-visual support, decorations, etc.). However there still are real expenses that you'll incur in hosting a virtual event. As outlined earlier in this document, vendors who provide 'turn-key' conference solutions can be quite expensive. If planning to produce your virtual conference on your own, you will still have expenses to cover to produce the event.

Once you've determined the technology that you'll use to produce and deliver a virtual conference, you will also need to consider the costs for other conference features. Similar to your in-person events, you may have speaker fees, costs for a registration system (including charges for electronic payment services), mail or shipping and handling charges, third-party products and services (e.g. message boards, closed captioning, etc.) and personnel costs of the added time and effort from you, staff and volunteers. While the latter may not be a direct expense, it will still need to be considered when planning a registration price.

Finally, the length & scope (number of sessions presented; whether the conference proceedings will be available for registered attendees to access after the event) need to be considered.

In most cases a virtual conference cost should be more modest than what in-person events would cost, but the price must correlate to your expenses. Setting a price point that is below your in-person conference fee may have the effect of actually increasing the number of paid registrants as may be deemed more affordable. The flexibility for people to access a virtual conference, coupled with a high-quality event that offers needed professional development are conditions that can help you determine the right price for your virtual conference.

Debriefing and Wrap-up

Similar to your in-person conferences, your virtual event is an opportunity to learn more about the participant, host and Tech Team experience. You should conduct a debriefing session with

representatives from your Planning and Tech Team as soon as possible after the event. A simple survey or check-in with your Room Hosts will help surface issues and suggestions that can help with future events. Your attendee survey will help gauge response to the event, and identify specific presenters that were unique in their use of the technology and techniques.

Disclaimers and Notes

All always – use good judgment and consider the culture of your team and organization when planning a virtual conference. No one way is the "right" way. The suggestions shared in this document are provided as a resource and should not replace any standard operating procedure or policy of your organization. You can find some tips in **Attachment D**: Tips and Suggestions for Planning Your Virtual Conference.

The products and tools listed in this resource are just a starting point for your consideration and there are many other credible providers of similar services. This is not an endorsement or guarantee of their effectiveness. Neither the ACTE Board of Directors or staff has any financial relationship nor receives any benefit from the products and tools shared in this planning guide.

Please feel free to adapt this guide and to share with others. But please don't violate accepted practice by using this work, and not crediting our organization or converting it into a product that you sell to others.

ATTACHMENT A: Virtual Conference Vendors List

Full Service Virtual Conference Providers:

NextThought is an online learning solutions company that focuses on building a collaborative and engaging experience for its users. Through a Community-Driven Platform, Turnkey Learning Design, and Video Production/Media Services, *NextThought* provides a robust set of tools and consultative services to support connected learning.

Meetings Tomorrow is a full-service audio-visual company that provides support for large in-person and online conferences.

Intra Studio is an online conference platform provider that uses a simulated environment for meetings, events and trade shows.

GTR Now is a conference and trade-show provider offering event registration, lead retrieval, attendance tracking, online meeting rooms, and full scale support.

CommPartners is a turn-key audio-visual company that provides support for large in-person and online conferences.

Napco Media offers a highly graphical virtual environment for conferences.

Conference Consolidators

Socio provides a robust environment from which you can customize your event using third-party tools.

Attendify an innovative environment designed to provide a high-level of engagement and participant interaction in a unique environment.

Whova is all-in-one event management solution designed to engage attendees effectively, and provide a robust set of tools to manage online event logistics.

EventCreate allows you to develop a reliable, simple event marketing program for your virtual conference by creating a beautiful event website, sell tickets, and promote your event online.

Wirecast is a live video streaming production tool that allows users to create live or on-demand broadcasts for the web.

Online Meeting Platforms

Companies that provide enterprise solutions for video conferencing, online meetings, screen sharing, webinars, web conferencing and cloud calling.

Adobe Connect   Microsoft Teams
GoToMeeting/Webinar   WebEx
Google Hangouts   Zoom

ATTACHMENT B: CTE Learn | ACTE Virtual Conference Service

CTE Learn provides a free virtual conference service for ACTE state association partners that have joined the CTE Learn network.

• *CTE Learn* hosts virtual conferences in an **asynchronous** manner.

• *CTE Learn* provides a turnkey service.

Why Asynchronous?

CTE Learn is powered by ACTE's strategic e-learning partner, MaxKnowledge, a leading online learning company that has been in the e-learning business since its inception. In its early days, MaxKnowledge used to routinely conduct synchronous virtual events. After many years of experience and analysis of user feedback, MaxKnowledge came to the realization that while properly designed webinars and video-enabled panel events are suitable for synchronous delivery, conducting an entire conference in a synchronous medium does not produce the desired learning outcomes.

Some of the challenges associated with a live virtual conference are:

- Participants may find predetermined session schedules inconvenient and exhausting.
- Participants may face interruptions or internet issues during an extended live event.
- Presenters may experience internet issues.
- Only a few participants engage in chat Q/A or discussions during a live session.
- Meaningful learning and sharing do not occur in session chat rooms and many questions remain unanswered.
- Differences in time zones make scheduling of extended live events challenging for national or global conferences,
- Coordinating and conducting extended live events require a significant investment in staff time, especially if the event includes concurrent sessions.

It is understandable that conference organizers may have the tendency to conduct their virtual conferences in a similar manner to their traditional conferences. However, the fact is that the design of traditional conferences has been largely influenced by physical constraints. For example, most traditional conferences must incorporate concurrent sessions to be able to deliver value in the designated conference period. This forces participants to choose a single session among many valuable sessions during a specified time period. Why should such a restriction be applied to the virtual world?

In an asynchronous virtual conference, presenters can practice and record their sessions in a controlled environment prior to the conference, resulting in higher quality presentations. More importantly, instead of quick chat conversations, presenters can

become active participants in peerto-peer learning and sharing via a robust social learning platform.

Granted, an asynchronous virtual conference may not sound as "exciting" as a synchronous virtual conference, but MaxKnowledge has found that the learning outcomes are far better, especially when the audience are professionals in the education field wanting to learn and engage in meaningful discussions.

Conducting an asynchronous virtual conference does require a paradigm shift. While it's okay to allocate a designated period (e.g. two days) for conference attendees to "attend" the sessions and engage with each other (asynchronously), the conference site should be available to participants indefinitely to allow participants to refer back to the sessions anytime they want, and share their challenges and experiences as they apply what they learn. Participants of an effective asynchronous virtual conference essentially become alumni of the conference with the potential to connect and collaborate in the real world.

Turnkey Service

MaxKnowledge is not simply a software provider. MaxKnowledge is a service provider exclusively servicing the career education community. ACTE's e-learning partnership with MaxKnowledge has many strategic dimensions. As such, MaxKnowledge has agreed to host virtual conferences as a free, turnkey service for states participating in the CTE Learn network.

Should you decide to host your virtual conferences via CTE Learn, you simply need to provide your conference information and details to MaxKnowledge.

1. MaxKnowledge gives you proposed messages and guidelines to send to your presenters.

2. MaxKnowledge collects the presentations and builds your virtual conference site.

3. MaxKnowledge gives you proposed messages to send to your registered attendees.

You would need to designate a conference chair to collaborate with MaxKnowledge and approve all presentations.

Plan your virtual conference at least three months in advance and make sure to give at least one month to presenters to prepare and record their presentations. Also, remember that you can hold multiple virtual conferences throughout the year for specific target audiences, so you don't need to jam all your desired sessions into one conference. Too many sessions in a virtual conference will overwhelm participants. MaxKnowledge team would be happy to give feedback to your conference committee to help you plan your virtual conference.

Please contact Michael Connet at mconnet@acteonline.org if you wish to utilize CTE Learn's virtual conference service.

ATTACHMENT C: Sample Tasks and Timeline

Time	Task	Comments
3 Month	Create your agenda	Program session timeslots, number of general session, exhibit hall only time, breaks, etc.…
	Create your conference Team and conduct your first team meeting	Determine who will handle areas such as, marketing, exhibitors, speakers, web, registration, social media, mederato, production, etc.… Share conference timeline
	Determine what virtual platform you will use	Zoom, GoToMeetings, Microsoft teams, etc.….
	Determine your marketing strategy	
2 Months	Create Speaker Presentation Google Doc	Include all required information, i.e., contact info, title, description, presentation, etc.… This way all of the speaker info is located in on location and is not being emailed to a team member in multiple emails
	Create Exhibitor Info Google Doc	Include all required information, i.e., contact info, logos, company web address, marketing material, videos, etc.… This way all of the Exhibitor info is located on location and is not being emailed to a team member in multiple emails
	Provide speakers with guidelines on how to successfully prepare a virtual presentation and include the Google link for them to upload their info	Provide as much information and resources as possible. Step-by-step instructions using either Google Slides our PPT. Webinars links and articles are also good resources
	Provide exhibitors with demo of virtual exhibit hall	This will allow them to better understand what their participation will look like
1 Month	Deadline for Speaker presentations	
	Deadline for Exhibitor information	
	Begin building conference website	Main page, virtual exhibit hall, etc.…
	Draft Scripts	
	Begin Developing Production Schedule	
	Recruit Room Hosts	
3 Weeks	Create FAQs to address any potential questions/concerns	Log in issues, tech issues, etc.…

2 Weeks	Create Slack group	Will allow for easy communication between all team members
	Training session for room hosts	Develop training documents, distribute and schedule demonstration/walk-through
	Recruit Tech Support Team	Develop training documents, distribute and schedule demonstration/walk-through
1 Week	1st dry run with room Hosts	
	Live Session rehearsal	
	Develop attendee evaluation	Include questions on each session, over all experience, etc.…
	Create day of document to share with team	Include contact info for team members, conference schedule, anything that they may need handy during the event
3 Days	Test your website capacity to avoid any day of overload crashes	
	2nd Rehearsal with room hosts	
	Log-In Test Day - Allow attendees to rehearse logging into the system - Assign team members timeslot for them to assist with this test day	
	Provide Customer Service rep with FAQs	
2 Days	Create document that contains direct links for all sessions. This will be used in case there are log in issues for attendees	
	Send presenters a reminder about the conference schedule. Include any last-minute tips one what to expect/do during their session, i.e., introduce yourself in the chat, respond to any questions that may come in…basically be a chat box facilitator	

1 Day	Make sure presentations are functioning properly	
	Distribute document that contains direct links for all session to team members	
Day Of	All team check-In, internal and external team members - Address any last minute questions/concerns	
	Make sure team members report to their appropriate post/assignments	
	Throughout the day check on team members to address any concerns that come up…technical challenges, etc.…	
	At the end of the event, download presentations and chat boxes info	
	Email Support	Designate a team member to address emails that may come in during the conference
Within a Week After the conclusion of the event	Conduct Debrief of event - Include all stakeholders	
	Send Thank you, evaluation (and after-conference access) email to all participants	
	Send Speaker Thank you notes	
	Send Room Host Thank you	
	Send Exhibitor Thank you notes	

ATTACHMENT D: Tips and Suggestions for Virtual Conference Planners

- Communicate, communicate, communicate
  - With room hosts
  - With registered attendees
  - With market potential
  - With conference team
- Have back-up plans for each aspect of the virtual conference (e.g. mirrored conference site, recordings of any sessions to be presented 'live', etc.)
- Use video to communicate information to attendees
- Develop check-list and timeline to follow clearly spelled out duties
- Check web site for load capacity; run test
- Hold a 'Test Day'; knowing your attendees, presenters and sponsors will be able to connect to the conference site on the day of the event is very important.
- Provide instructions on how to use the Virtual Exhibit Hall so attendees know what to expect and how to interact
- Produce a video listing all exhibitors/sponsors to play before each general session
- On the Day of Event-Have a conference bridge open for the Tech Support Team
- Play music before the conference opening, before general sessions and, if possible, in front of concurrent sessions (NOTE: Copyright considerations must be considered; Professional music licenses can be obtained through BMI/ASCAP; Alternatively , copyright free music can be found at Free Music Archive or the Facebook Sound Collection
- Do more than one practice session with Room Hosts (in addition to holding a training session and providing instructions).
- Presenter videos need to be collected a minimum of 2 weeks prior to event to review and ensure playback is optimal
- The presenter instructions need to be detailed and include specific information to help them create their videos within specification and outline their role during the session (e.g. respond via live video, respond via text chat, etc.)
- Consider mailing instructions to attendees with instructions on how to access the conference site and to maximize their experience; also use to promote sponsors & exhibitors
- Ask attendees to share a photo in their Zoom profiles (personalizes the experience)
- Ask exhibitors to share a give-away/novelty item that could be collected and sent to each attendee with instructions on how to visit the virtual exhibit hall
- Consider having 'emergency instruction' emails pre-prepared to send to attendees should technical issues arise during the conference
- Be sure to send thank-you notes to presenters, room hosts, sponsors & exhibitors, planning committee members, etc.