

# Best Practices for Virtual Events

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Best practices are typically guidelines that help to provide consistent approaches to reaching deliverables. They should be innovative to fit changing circumstances.

The purpose of this document is to help identify the best ways to navigate Carleton University virtual events. To assist with building a more inclusive reference, we ask that you share your successes and challenges. The result hopefully will be an online forum that helps illuminate best practices.

Given the costs involved in travel and attendance to conferences, and the capacity for online tools to replicate the experience, it may well be that COVID-19 has ushered in major long-term changes in the event industry.

There are multiple virtual event formats that can be created, including online concerts, fireside chats and podcasts. This document focuses on the two main formats currently used on campus.

## General

There are three key areas to keep in mind when planning a virtual event:

### 1) Legalities

FOI obligations (under FIPPA)

Any information/records we collect or generate are subject to access requests. We do have record retention guidelines around the information, so consider that some of it may need to be saved on the W drive:

<https://carleton.ca/records/retention-schedule/>.

For external guests, **ADD** to the event registration/landing page: *“By clicking submit, you acknowledge you have read and agree to the event disclaimer and privacy notice.”* Or, if registration isn’t required: *“By attending the online event, you acknowledge you have read and agree to the event disclaimer and privacy notice.”*

### 2) Inclusivity

Virtual events should be as inclusive and accessible as possible. Consider a diverse range of voices for your speakers, guests and industry representatives.

Make sure clear language, large fonts, and high colour contrast is used at all touch points—including presentations.

Provide captions and visuals where possible for audio and provide descriptions for visuals.

For closed captioning using Zoom, familiarize yourself with the tool here:

<https://support.zoom.us/hc/en-us/articles/207279736-Closed-Captioning>.

For closed captioning using MS Teams, familiarize yourself with the tool here:

<https://support.microsoft.com/en-us/office/accessibility-support-for-microsoft-teams-d12ee53f-d15f-445e-be8d-f0ba2c5ee68f>.

Carleton has its own accessibility guidelines for website content:

<https://carleton.ca/webservices/accessibility/>.



### 3) Branding

You want a cohesive look to your event from beginning to end. Some people may be presenting from their homes and won't have the most neutral background. To personalize/customize your event you can download/upload a Carleton-branded background under the DUC website, Virtual Events Resource Tools page.

<https://carleton.ca/duc/resources/virtual-events/>

If you would like to create your own virtual background for Zoom:

[https://www.youtube.com/watch?v=sL\\_WNDpdRnI](https://www.youtube.com/watch?v=sL_WNDpdRnI).

For MS Teams, to use a built-in or custom background (scroll down):

<https://www.howtogeek.com/670059/how-to-use-virtual-backgrounds-in-microsoft-teams/>.

## Planning

Start with a strategy/concept. What format is best for your messaging and objectives?

When selecting the right date and time, take a look at internal and external calendars. You might want to refer to any analytics to see when your targeted audience is typically online.

The event title should immediately tell readers what your event is and why they should attend (No longer than 60 characters including spaces. Avoid generic or vague terms. Think of the words that your potential attendees might search for.

What platform is best-suited to the delivery of your event (Zoom, MStTeams, etc.).

Create a Welcome Kit/Page

- Craft a welcome message.
- Identify top 10 questions that your guests might ask.
- Provide instructions on what to do should technology fail.

In your program design, create opportunities for engagement. Have viewers submit questions in comments or through a chat tool, participate in polls, ask for feedback.

Speakers can be influencers. Provide them with the details they need to become event ambassadors.

Questions to be asked/answered:

- Will the event be virtual, live, or hybrid (both)?
- Will it be recorded?
- Where do I want the content to be seen?
- Do I require event registration?
- What data do I plan to track?

## Technology

CUES have Zoom licences that can accommodate six concurrent sessions with up to 300 seats per session.

Most departments within Carleton have purchased plans on MS Teams. Check with your departmental administrator.

Determine whether you will have one physical place from which you can stream the event, or whether it will be fully virtual. Conference Services is currently building a *hybrid* (part live/part virtual) space at Richcraft Hall which will allow all or some of the participants to come together on campus in a safe environment.

Conference Services is currently building a *hybrid* (part live/part virtual) space at Richcraft Hall and Residence Commons which will allow all or some of the participants to come together on campus in a safe environment.

Hosting and moderation are key to making your live event successful. There are a lot of roles during a live event and it's critical to ensure that all items are covered and it is clear who is doing what when.

CUES recommends having a tech meeting with the hosting department and their presenters at least a few days beforehand to go over the cue-cue list (chronological breakdown of events)

Test your Internet connection and have your speakers do the same. Prepare backups of visuals and presentations in case a file goes missing.

CUES is assembling support kits that can be loaned out to participants/speakers. They would include things like laptops, microphones, lighting kit, etc.

Email CUES at [ims.conference.support@carleton.ca](mailto:ims.conference.support@carleton.ca). They will assess the request and delegate the event to an event specialist. It is hoped that they will shortly have an intake form created to simplify this process.

## Marketing

Carleton branding should be considered from the beginning (website, live event landing page, presenter backdrops or framing, static logo page, etc.).

Make sure you select the virtual events category in the CU Event Calendar when adding your event. <https://carleton.ca/socialmedia/>

Carleton University has social media accounts across the main platforms. For conferences and webinars, the most relevant social media platforms would be Twitter and LinkedIn.

Twitter's best practice guide: <https://business.twitter.com/en/basics/what-to-tweet.html>.

LinkedIn's best practice guide: <https://help.linkedin.com/ci/fattach/get/9336437/0/filename/LinkedIn%20Sharing%20Guide.pdf>.

Create an event countdown in Instagram stories.

Create a Facebook event.

Consider listing your event on Eventbrite.

To help with promotion and increase scope, reach out to potential sponsors to see if they want to partner with you for your virtual event.

<https://carleton.ca/secretariat/wp-content/uploads/Corporate-Sponsorship-Policy.pdf>.

**Help us to make this reference more relevant and current by submitting your feedback after hosting or participating in a virtual event. We will post your comments on a forum page located within the Department of University Communications.**

**Here is the link: <https://carleton.ca/duc/virtual-events-feedback/>.**

## Resources

### Internal:

<https://carleton.ca/culearnsupport/instructors/zoom-web-conferencing/>

<https://carleton.ca/teachinglearning/web-conferencing-at-carleton/>

<https://carleton.ca/webservices/2010/linking-best-practices/>

<https://carleton.ca/webservices/2010/love-your-links-google-analytics-link-optimization/>

<https://carleton.ca/webservices/2009/working-with-images/>

### External:

<https://support.zoom.us/hc/en-us/articles/209743263-Meeting-and-Webinar-Best-Practices-and-Resources>

### Other Virtual Event Platforms:

Brella: [Brella](#)

Speakers, multitrack agendas, sponsors, individual streams, and more are covered in this hub for virtual conferences

Vfairs: <https://www.vfairs.com/>

Conferences, trade shows, career fairs

