Tips for Conducting On-line Workshops
June 8, 2020

These notes provide suggestions for planning a major on-line public workshop. The suggestions also can be tailored to smaller meetings, such as study sessions and focus groups. Recently, we've had strong success with on-line workshops. In communities of about 50,000 population, we've had approximately 120 people register in advance to attend workshops. Of those, about 70 to 80 actually sign in for the workshop. Of those, about 75% participate in the on-line activities during the workshop. Of the 25% who do not participate, we estimate that they consist of staff and non-residents, as well as those who choose not to engage or are using a device that does not facilitate interaction.

ADVANCE PLANNING
1. Outline the scope of the workshop.
   - Define goals and expected outcomes.
     - To inform the public or interest group
     - To gain support for the project in general
     - To gain support for specific proposals
     - To gain guidance on specific topics
   - Determine material to be presented.
     - Powerpoint tailored to the workshop
     - On-line maps or material from the city's web sites
     - Other?
   - Determine the level of engagement to be involved.
     - During the workshop
       - Polling?
       - Write-in response to questions?
       - Managed chat?
       - Open mic?
     - After the workshop
       - Posts of materials from the workshop
       - Follow-up survey?
   - Outline the timing for the workshop.
     - Balance presentation time with feedback time.
     - Basic components:
       - Introductions
       - Presentations
       - Polling
       - Chat
       - Summary
   - Identify hosts, presenters and speakers.
     - Senior official to welcome participants
     - Project manager to introduce the project
     - Consultants who will present material

- o   Key staff who will assist in the presentation or answer questions
- Identify who will share screens and advance the slides in the Powerpoint.
    - o   We find that it is easiest if one person controls the presentation, rather than passing control around to each speaker.
    - o   As each speaker talks, they cue the controller to advance the slides.

2. Develop an internal schedule for workshop preparation. This includes timing for preparation of:
- Developing and publishing workshop notifications
- Preparing presentation materials (Powerpoint, etc.)
- Drafting polling questions
- Drafting open-ended questions

3. Arrange to have tech support available to help in planning the activities.
- Ideally, this is the city's IT department.

4. Determine the platform to use (e.g. Zoom, WebX, etc.).
- It's best if the system is one that the city is familiar with.
- Confirm that the level of the user's subscription can handle the number of participants anticipated.
- Determine how to manage people's faces being displayed.
    - o   Ideally, the presenters are visible when speaking, but not other participants.
- Confirm that the chat function can be "managed."
    - o   Chat comments should come in to a person who screens the comments and then shares some of them, as appropriate.
    - o   There should not be an "open chat" format in which conversations cannot be filtered.
    - o   Ideally, there is a separate "private" chat for presenters only.
        - ▪   If not, arrange to have personal cell phone contacts shared and set up a chat group.
- Confirm that there is a polling function.
    - o   This should be built into the platform, but may be a second party tool.
- Can the system have two separate log in addresses? One for panelists and one for the public?
- Have some demographics polling early in the session.
- Determine if the entire workshop can be recorded.

5. Determine the scheduling for the workshop.
- Most workshops are scheduled for mid-week.
- Will there be only one session, or will it be repeated?
- Determine the time of day for the workshop.
    - o   Midday? Afternoon? Evening?

- From our experience, we've had equal levels of participation for late afternoon and early evening meeting times.

6. Determine how the workshop will be publicized.
- General notice on city web site
- Targeted email lists (list serves, affinity groups, etc.)
- Print notices?
- Posters?

7. Publish advance notice of the meeting.
- Include a brief explanation of the purpose, and of the types of interaction available.
- Establish a means of registering for the meeting.
- Encourage people to register.
  - This is not required, but helps in planning for the event.
  - And, those registered will get direct follow-up reminders, etc.

8. Develop the presentation.
- The Powerpoint should be highly graphic.
  - Keep backgrounds simple.
  - Keep persons with visual impairments in mind in choosing color combinations.
- Plan the graphics to be readable on a laptop screen.
  - If using a map that covers a large area, present the overall map first, then zoom in for details.
  - Use one image per slide for most material; two images maximum.
- Keep text simple and in a large font.
  - Use a clean font (preferably san serif).
  - Limit text to bullet points, four to five words per line maximum.
    - Avoid long sentences which invite reading the entire slide.
    - Use the bullet points as prompts for speaking.
    - Write a script in the Speakers Notes mode if necessary.
- Plan an orderly sequence of information; the classic is:
  - Tell them what you will tell them.
  - Then, tell them.
  - Then, tell them what you told them.
- Organize the presentation in modules.
  - This helps people understand where they are in the presentation.
  - It also facilities taking breaks for comments or interaction.
  - 20 minutes should be the maximum of one module.
    - Provide sufficient time for each slide for viewers to grasp the point.
    - Don't change slides too quickly, but keep moving.

9. Rehearse the presentation.
- Review the Powerpoint with the team, on line.

- Test the webinar platform with all key presenters.
- Check internet connection speeds of the individual presenters for video and sound clarity.

10. Develop an Instruction Sheet for On-line Participation.
- This should provide a short explanation of how to sign in and address typical technical issues.
- This would be distributed to those who register in advance.

DAY OF THE EVENT

1. Send an "upcoming meeting" reminder to registrants.
- Do this 1 hour ahead of time.
- Include the Instruction Sheet for On-line Participation.
- Invite participants to sign in early, for those wanting to learn how to use the webinar platform and polling activity.

2. Have presenters sign in early.
- Conduct a sound and visual check.

DURING THE EVENT

1. Have a person who is technologically savvy run the presentation.
- This is usually a Planner on staff.

2. Have another person tasked with monitoring chat conversations.
- They will scan for potential comments or questions to raise during the event.
- Then, at scheduled points in the event, they will read the selected questions for panelists to answer.

3. Also have a tech support person on call who can assist individuals who are having trouble using the platform.
- Provide text and phone contact information for the tech person on a startup slide.
- Also have the moderator/host announce this service.

4. Have some practice questions for the early sign in time.
- These can be demographic questions.
- This allows people to get familiar with the interface.

5. Mix up presentation modules with interaction modules, to the extent feasible.
- Ask some basic demographic questions early in the workshop.
- Pause at intervals in the presentation for polling or managed chat interactions.

AFTER THE EVENT

1. Post the PPT presentation.

2. Post a recording of the entire session (if feasible).

3. Post a summary of the polling and write in comments.

4. Post a schedule of next steps and instructions on how to provide comments.

5. Post a follow-up survey?