

LOGISTICS & DOCUMENTATION FOR ONLINE EVENTS



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I. WEBINAR ROLES

Each webinar is different. Depending on the format, length, and topic, one or multiple people may work on a webinar from start to finish. The other roles can be taken on by multiple people. These are the different tasks identified with each webinar:

- **Producer:** The project manager for the webinar. They work with the presenter/panelist to develop the webinar description, provide bios, and assign roles as needed.
- **Presenter/Panelist:** Responsible for content development and/or delivery of content.
- **Host:** Introduces the session, gives instructions on how the format will work, and introduces the presenter(s). The host may also moderate Q&A if needed.
- **Facilitator:** During the session, the facilitator monitors chat messaging for questions for the presenter(s) and for technical difficulties. The facilitator may also moderate Q&A if needed.

In general, we suggest there always be one facilitator who is there for technical support in addition to the producer, host and presenters. Typically there are 1-2 Producers and 1-2 Hosts each event. However, it is common for the same people to fill both these roles. Panelists and Presenters vary from 1 - 5 people. Having more than 5 people on a panel becomes difficult to coordinate and does not provide ample time for everyone to participate.


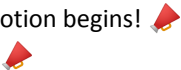
II. GENERAL LOGISTICS

- **Use a script** that specifies who speaks when
- Make sure **intros and outros acknowledge speakers and others involved**
- Script **INTRODUCTION** should include the following:
 - Title of the event and if it is associated with a committee, group or collaborator (ie. CEA Task Force, RAVA Committee, etc.)
 - Introduce all co-producers/hosts
 - Introduce your presenter(s) names/titles/preferred pronouns
 - [Code of Conduct](#)
 - Explain the following in the introduction:
 - ◆ How will Q&A be handled? Will it be during the event or at the end?
 - ◆ How should attendees use the chat button and Q&A button (ex. Some prefer for technical difficulties to be in the chat and all questions to be in Q&A)?
 - ◆ Will someone be monitoring the chat box and Q&A?
 - ◆ How will technical difficulties be handled?
 - ◆ Will there be breaks and when will they be?

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- ◆ Remind attendees that the event is being recorded and that they will be sent the link at a later time
- ◆ If there is a portion of the event that will not be recorded attendees should also be informed of this
- ◆ Whether or not there are any resources that will be shared and how they will be shared
- Opening with an indigenous land acknowledgement is encouraged. For California you can use this site: <https://native-land.ca/>.
- Consider a grounding (breathing) and/or interactive exercise (e.g. “type where you are from in the chat” to help people ground and engage).
- Include the following at the end of the event during the **OUTRO**:
 - Thank the presenters, co-hosts, collaborators, etc.
 - Include links to the feedback survey, related organizations, hashtags, and any resources being provided
- **Sample scripts from previous webinars that can also be used as templates**
 - Single presenter: [Intro to AV Formats](#)
 - Multiple day workshop: [Airtable Webinar Day #1](#) and [Day #2](#)
 - Multi-session series/Multiple panelists: [Remote Collections Panel Day #1](#) and [Day #2](#)
- **Use a slide template:**
 - [Download a slide template here](#) [ppt].
 - [Example of slides for Airtable Webinar](#)
 - [Example of slides for Remote Collections Panels](#)
- **Schedule in extra time:**
 - Always allow time for a **break part way through** to let people stretch or use the bathroom. Typically a 60 minute event should have a 5 minute break part way through and for anything longer there should be multiple.
 - Program in an **extra 10-15 minutes** in case people go over their time
 - Allow **5 minutes** at the end for people to fill out the feedback survey. Laura Rooney will create the feedback survey for all online programming, so this is not something the producers or hosts are responsible for.
 - **All together this is 20-25 minutes that have no one presenting.** Keep this in mind when you are determining the length of your event.
- It is a good idea to shave the chat before you log out of Zoom. If you need to save the Q&A you will have to cut and pasted into a text document. There is not an option to automatically save the Q&A within Zoom itself.

III. COUNTDOWN TO EVENT

4 Weeks Prior	3 Weeks Prior	2 Weeks Prior	1 Week Prior
<p>Review and delegate logistics:</p> <ul style="list-style-type: none"> • Roles • Description • Slide development • Point of contact <p>Determine:</p> <ul style="list-style-type: none"> • Date of event • Time of event • Pricing scale • Track and format of event <p>Confirm all speakers/participants and send them this speaker form: https://forms.gle/qJFBNo4mQhFZmJrv6.</p>	<p>Submit to AMIA Office and Program Manager:</p> <ul style="list-style-type: none"> • Event description • Date • Time • Event track • Event format • All speaker information • Any additional hashtags <p>Schedule time for technical runthrough and day-of logistics with all participants: practice transitions, screen sharing, presenting video or other media.</p> <p style="text-align: center;">  Promotion begins!  </p>	<p>Meet for a technical runthrough and day-of logistics: practice transitions, screen sharing, presenting video or other media.</p> <p>Is anything needed for the event? Things to consider include:</p> <ul style="list-style-type: none"> • Will folks show slides or video? • Will the event be moderated, and if so how? • Is there a Q&A? • If there are multiple speakers, who should speak first, how will folks complement each other's work? 	<p>Finalize any resources that need to be sent to attendees and submit to AMIA Office.</p> <p>Send reminder to participants to meet 15-30 minutes prior to the start of the event and that Laura will send the Zoom link <i>the day before</i>.</p> <p>If appropriate, send run-of-show one sheet. Here is a sample template: https://tinyurl.com/8774kzer</p>

IV. PROMOTION

- The AMIA office will promote the event to the AMIA listserv, AMIA members, and through AMIA’s social media channels. If the topic is appropriate, the office can post to the ARSC, IASA, DigiPres, and ICA listservs.
- Everyone involved in the webinar is also responsible for promoting the event. The AMIA Program Manager for Online Education as well as the AMIA office will promote your event to the following places: AIC/FAIC, ARSC, SAA, IASA, ALA’s Digital Preservation Section, AMIA-L, AMIA-Member, ACA, SCA, CLIR DLF, Sound and Vision, and various university listservs/Facebook Groups (GEM, Ryerson, UCLA MLIS and NYU MIAP), AMIA Facebook, LinkedIn, Instagram, and Twitter accounts..
- Promotion should start *no later* than 2 weeks prior to the event.

PRICING, STIPEND & PAYMENT FOR PARTICIPANTS

- To recognize the work involved in developing and delivering online learning, AMIA offers payment to participants. This stipend is contingent on revenue generated through ticket sales. At most, participants will split a stipend of up to \$300. If the event makes less than \$300, whatever amount is made from ticket sales will be split among participants.
- The producer works with the AMIA Office to determine pricing for their event, which will be on a sliding scale. Factors such as the type of webinar, if any sponsorships are attached, the length of the webinar, and if it is part of a series are all considered. Although these prices may change over time, [here is a sample pricing breakdown](#) for the various types of content AMIA has offered that can be used as a reference.
- The producer finalizes any potential stipend payments with the presenter(s) and informs the office. Stipends are paid by check after the webinar.
- **Making sure all participants fill out the [Speaker Form](#) is crucial**, since this ensures that the correct contact information is received for participants to get paid and accommodate anyone who is donating their stipend to another attendee.
- Consider all webinar roles when allocating and dividing the stipend. The current guidelines offer \$300 for webinar speakers in addition to \$50 for webinar host(s)/producer(s)/facilitator(s). In some cases, the roles may overlap.
- Most content will be recorded and made available at a reduced price online within a week. After 6 months select programming will typically become free to members. For a webinar series it can take closer to a year for it to become available to members for free—but this is contingent on the timeliness of the content.

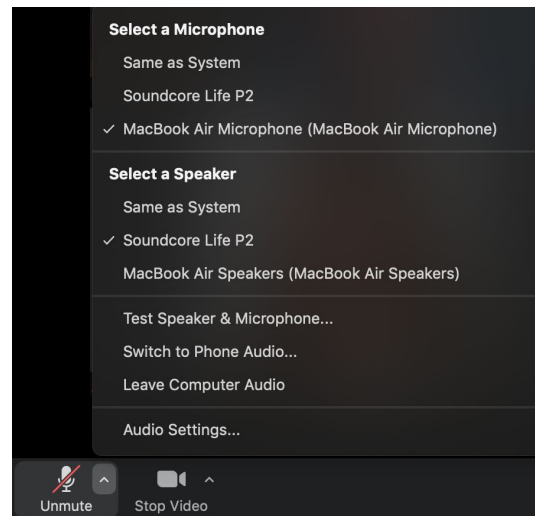
V. ZOOM FUNCTIONALITY

- Currently, there is a limit of 100 people per webinar. This includes presenters.
- If feasible, connect to the internet during the planning session and webinar via hardwired ethernet cable, as this will allow better connectivity.
- Make sure you have updated Zoom to the most current version. There will be technical difficulties if this is not done in advance. It is also a good idea to remind attendees to do this as well.
- All presenters will receive a Zoom email with a link the day before the webinar. This link is different from the one given to attendees and allows panelists to log into the webinar prior to its start.

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- Attendees are held in the waiting room until the webinar broadcast begins.
- Presenters are visible but none of the attendees are.
- You can send chats privately to presenters and/or attendees. However, you can only chat with specific attendees if they ask something in the chat first.
- Remember to turn off mics and video when not presenting to help with bandwidth. It is helpful to share links in the chat as they are mentioned. It is recommended that there are two people following a script to be able cut and paste in the chat: one reading the script and the other pasting the links in the chat.
- Panelists can't see the Q&A or chat screens while in screen share mode. Plan accordingly with enough people to moderate if this will be an issue for how your programming is structured.
- All presenters can share from their own computer screen.
- If you have notes you need to follow while presenting, they will need to be opened in a separate window than the one that has the slides or media you plan to share for you to have access to your notes while presenting. Another option is having your notes on another device or on paper.
- For free webinars that go over the capacity of AMIA's Zoom subscription we recommend using Instagram Live or YouTube Live. We do not recommend Facebook Live.

PRO TIP: If you use a single device for both your speaker and microphone in Zoom (input and output), speaker audio will be compromised. If two sources of audio are available (ex. laptop and headset), consider using one for the speaker output and the other as the mic input.



VII. HELPFUL LINKS WITH TIPS FOR GETTING THE BEST ZOOM QUALITY

- Zoom system requirements:
<https://support.zoom.us/hc/en-us/articles/201362023-System-Requirements-for-PC-Mac-and-Linux>
- Improving your Zoom connection:
<https://wiki.millersville.edu/display/instructdocs/Improving+your+Zoom+connection>
- Zoom video tutorials:
<https://support.zoom.us/hc/en-us/articles/206618765-Zoom-video-tutorials>
- Internet speed test:
https://support.google.com/websearch/answer/6283840?p=speedtest&visit_id=637274144079147076-3481333460&rd=1

VIII. ACCESSIBILITY

Accommodations Consistently Offered for All Online Content:

- Preferred pronouns of presenters
- Communal note taking
- Live captioning for all events hosted on Zoom
- Auto-transcription and captioning for video recordings on Aviary
- Accessible PDFs with OCR of any documentation shared

ASL is not affordable for online programming at this time. This is something AMIA would like to work toward providing in the future.

Other Resources:

- Web Content Accessibility Guidelines (WCAG) 2.0: <https://www.w3.org/TR/WCAG20/>
- “Universal Design Resources” section in Preliminary Resources: Disability Consciousness Raising Doc:
 - Google Doc Version:
<https://docs.google.com/document/d/1retegonDGrBYRZqUAaPrzjrsN5RE3Ee0sa0F3t3yas/edit?usp=sharing>
 - PDF with OCR Version:
<https://drive.google.com/file/d/1tZNOyX8-7T2T2l3gJo4trUWM1rhAQ8PF/view?usp=sharing>

IX. PANEL LOGISTICS TO REVIEW BEFOREHAND

The bullet points below are typically reviewed verbally with all the panelists 15-20 minutes before the webinar officially starts.

- **[Insert Name of Host #1]** will introduce the panel and moderate the questions with the panelists for the first hour.
- **[Insert Name of Host #1]** has notes on specific questions panelists have agreed to speak to.
- Because of the delay in Zoom and to try to avoid people talking over one another or accidentally interrupting please use the hand raise function on Zoom when you want to answer a question and **[Insert Name of Host #1]** will give everyone a turn to respond
- There will be a 5 minute break between the panel and Q&A. A slide with the panelists' names will temporarily go up.
- While panelists are talking people can submit questions with the Q&A function, but questions won't be answered until the last 30 minutes.
- Everyone on the panel, as well as **[Insert Name of Host #1]**, will be visible. However, presenters will not be able to see the audience members.
- If people provided specific links to questions **[Insert Name of Host #2]** will put these in the chat box while the speaker is answering the question.
- The resources document has been shared with the attendees in advance, but any relevant material to it that comes up throughout the panel will be added afterward.
- **[Insert Name of Host #2]** will lead the Q&A and close everyone out at the end.

X. GUIDELINES & TIPS FOR PANELS

- Laura Rooney will provide the Zoom link the day before the event. This link is different from the generic link attendees receive. Be sure to use the link with the correct privileges. For both of these links the login time will appear as the start time of the event. However, panelists and hosts will still be able to login beforehand. If this could be confusing for participants, it might be worth mentioning to them in advance.
- It is *highly recommended* to ask panelists and presenters to meet 15-20 minutes before the online event so everyone can quickly go over the flow of logistics.
- For those receiving speaker fees Laura Rooney will be in touch after the online event to coordinate payment.

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- For panels, coordinators should prepare questions in advance and also ask panelists which questions they feel they can speak. This helps to know who should lead on which question, if there is enough time for all of the questions, and if there are questions that are not relevant to the group and should be taken out to avoid any awkward silences.
- Zoom has a delay! It is important to remind people of this. One way to cope with this is to decide on how people should indicate they would like to speak. This can be done with the “raise hand function” on Zoom, in addition to having a moderator. This way everyone is heard and no one is talked over.
- Laura Rooney will manage opening and closing slides, since when someone is screen sharing on Zoom they are unable to access the chat box feature to share relevant links or see anything in the chat box if there is a technical difficulty. With someone other than the speaker sharing the slides, they are able to interact with participants and other hosts simultaneously. For previous panels this required 3 people: Laura sharing the slides, whoever was speaking and someone else in charge of sharing links related to what the speaker was saying.
- Moderators for all events are necessary. This is also the case if there is a Q&A.
- Although you can save the contents in the Zoom chat box, it is not possible to save the contents in the Q&A. If there are questions people do not get to during the event that need to be answered, they will need to be copy and pasted into a word document before leaving/ending the Zoom event.

XI. GUIDELINES & TIPS FOR WEBINARS

- All webinars produced by the CEA Task Force rely on an outline that specifies individual roles, names of who is presenting, what is being presented, time allotted to each section/speaker, and links to cut and paste into the chat when relevant. This is something the Task Force *highly recommends* for things to run smoothly.
- For intensive webinars or those that are multiple days, it is also *highly recommended* that a trial run is scheduled prior to the event to run through material and work through technical logistics. For the “[Airtable for A/V Archivists](#)” Quarantstream two-day webinar a 2 hour trial run was scheduled to go over and practice transitions. For a one-day intensive a 1 hour is sufficient.