Suggestions and best practices for organizing, hosting and reporting of IUFRO online events and virtual meetings

This guideline document addresses three main stages for virtual meetings: 1. Preparation for the meeting; 2. During the meeting; and 3. Following the meeting, all with a brief section with specific comments on related issues.

1) Preparation for the meeting

a. Setting up the meeting

i. **SELECTION OF THE PLATFORM:** Pro licenses for Zoom and Teams are available for some institutions but there is a charge to allow a large number of people to participate. This should be considered during the planning in order to assure equal opportunities for all (potential) participants. In addition to the cost, unfamiliarity with IT can condition the use of platforms to support virtual events. Training on digital skills for both organizers and participants in advance of the meeting is recommended. Platform details for available options (official websites/support pages of Zoom, Teams, Webex, Google meet etc.) concerning requirements, performance, license costs accordingly to the number of participants would help the organizer to decide on the best option for a given meeting. Some online meeting platforms provide simultaneous interpretation (QuaQua) which is an additional advantage for facilitating communication.

ii. **RECORDING AND DISSEMINATION THROUGH OTHER CHANNELS:** Recording the event and putting the records available in other channels (e.g., Zoom provides the option of direct dissemination through YouTube) should be considered. This option helps cope with time difference issues and with the risk that some of the participants don't have access to the required internet speed and computer facilities enabling them to participate. Furthermore, participants can watch the recording later in case of internet connectivity breakdown or connection difficulty.

iii. **DATA PROTECTION**: The action of recording needs to be explicitly mentioned. In case it is decided to record the event, the organizer has to inform all participants that the recording function is set and it should be possible for individual participants to participate without being recorded. Comment: there probably is an unresolved issue with recording of online meetings, cf. EU GDPR (e.g., how to handle a consent that may later be withdrawn).

Tips on how to deal with data protection regulations: (1) Organizers may request a pre-registration to send an Informed Consent and Information to participants. Participants need to consent to the terms and this option could be the safest. (2) Participants can be asked to accept the terms at the beginning of the meeting (e.g., through an automatic procedure when joining the meeting). (3) Organizers can provide information and rules to participants prior to the meeting and declare these rules at the beginning of the event (e.g., GDPR: no photographs will be taken without consent, no recording will be made, etc.). See also item 1) b. iii.

iv. **TIME SCHEDULE:** Global time difference should be considered when planning online events, as people are not all on the same spot, in the same TIME ZONE. Some suggestions to follow, whenever possible, are: to split to zones for organizing a meeting where the time difference is minimal; live events have to be timed at different instances, catering for different parts of the world. Make sure to provide detailed information about the time of the meeting for a different time zone. Participants should be advised to adjust the meeting time to their time zone. In case the meeting takes place in spring/autumn, it is also important organizers and participants check when the summer/winter time starts in their locations. Take note that the DURATION of the meeting days can be different.

v. **ANNOUNCEMENT:** General IUFRO guidelines for face-to-face events should be followed, with relevant adaptations. Identification of the maximum number of participants and what

the selection criteria are, if any, should be indicated. A pre-registration might be requested to help to decide on the platform to use.

vi. **REGISTRATION FEES:** In events for which IUFRO is responsible, IUFRO can guide in setting the registration fee, if any, to favour participation. If a registration fee is charged it should be based on a transparent budget agreed among all organizers.

vii. **INVITATION:** The host creates the event and sends out the meeting invitation. In some cases, a Calendar Event in Microsoft Outlook is created – this allows the users of Outlook to add the event directly in their calendars. Reminders before the meeting will then be sent automatically to the user/participant.

viii. **AGENDA:** An agenda should be prepared and communicated to the participants, even when events involve a relatively small number of participants. The meeting is much more efficient when the participants have read the background documents in advance.

ix. **DIGITAL SKILLS:** The organizers need to have relevant digital skills or should assure that someone working with them has, to help with the event planning and be present during the event. For each meeting, the organizers should provide a short document about what is expected from the presenters and the participants and with instructions for participation. FAQs about participation and technical issues should be prepared and divulged in advance. Proposals of how to deal with obstacles should be provided (e.g. instability of connection). See item x. ASSIGNING TASKS FOR THE ORGANIZING TEAM.

x. **ASSIGNING TASKS FOR THE ORGANIZING TEAM:** The online interactions require quite a lot, in terms of concentration, dealing with technology glitches, not being able to really 'read' the other people in the room. It is convenient and recommended to have 4-5 team members (organizers/hosts), with at least one of them being at a different location. One team member can be the main host. A second team member can assume the role of co-moderator to be attentive to communication that occurs in chat or otherwise and take notes. A third team member from the organization can help with the technical arrangements. A fourth team member can participate in the event as a participant (and on equal terms with other participants), so that she/he can monitor how the session is going and report problems or irregularities to one of the other team members who can then act accordingly. In case the host experiences problems with the internet connection, there must be a substitute at a different location who can ensure the continuity of the session/meeting. In case it is not possible to follow this suggestion, it might be arranged in advance with one of the presenters who will take on temporarily the role of host.

xi. **TASKS FOR THE MEETING:** The organizers might give participants direct <u>tasks for the meeting</u> (e.g. asking to prepare a slide or an overview of a topic, facilitate an agenda item etc.) and thus facilitate virtual "team work".

xii. **TEST**: A preliminary test with the organizers and the presenters should be performed some days before the date of the meeting. The test should include a test for visual effects, sound (using the same devices that are planned to be used during the event), computer screen sharing, etc. At least one participant in the test should participate in the role of a regular participant.

xiii. **SETTINGS SET BY THE HOST:** Be aware of the options available in the selected platform. In Zoom, the host has the right to, for example, allow meeting with only audio or both audio/video. The host can also set up various additional settings concerning the technical arrangements.

xiv. **PRESENTATIONS FORMAT AND TALK LENGTH:** Some basic orientations could be provided in advance to the presenters. This may include advice on lighting, choice of background, to not talk too fast (in particular when there is no visual support for the presentation), etc. To alleviate some of these problems and the problem of unstable internet connection, sharing in advance of a written summary of the main points is encouraged. Talks and presentations should probably be shorter than at physical meetings, more snappy, etc., and consider some form of involvement from the participants (see also 1) a.xv. and 2) c. ii)

xv. **PLANNING THE INVOLVEMENT OF PARTICIPANTS:** Planning interaction activities is fundamental for involvement. Some suggestions are provided here. See also 2) c. ii. At the beginning, promote interaction with the participants showing them some features of the platform. In events with few participants, a brief introduction of participants (Tour de table) works well. In events with many participants, it is adviseable to proceed to random separation of participants into small groups, with allocation in separate rooms for brief introduction and social interaction with a dialogue about one topic/question related to the event theme. This could take 5-10 minutes. During the meeting provide shared screen access, allowing participants to mark on a world map the country of origin, or identifying, in a list pre-defined, the area of expertise; promote opinion polls, group discussion in break-out rooms , and chat questions during the session. For presentation or discussion, in parallel, of several themes/sessions, create rooms, one by theme, each with a moderator, to allow rounds of participants. Each participant may visit a room of his or her preference and stay for a period stipulated by the organizers, passing sequentially to another room(s). For example, spending 15 minutes in the first room, 10 minutes in the second room and 5 minutes in the third room. At the end, again in the plenary, the moderator of each room makes a synthesis of the discussion.

xvi. **FIELD TRIPS:** Field visits can be modified and transformed into virtual field visits. The visit can be conducted before the meeting with a small number of people and highlights can be recorded. The film should be made available before or at the event (or scheduled to be available at the beginning of it) and may be followed by a participatory session for discussion. Questions may be asked directly to the moderator, for further clarification for all participants.

xvii. **CHAT:** Before leaving the meeting, "save chat" option can be used to retrieve the information from the chat. It might be useful to schedule a discussion after the presentation, later on (e.g. same day, after a break), based on the questions in the chat.

b. **Communication to the participants before the meeting**

In most cases, the host/organizer approaches the participants regarding the following:

i. **AGENDA:** Make sure to reserve time in your calendar for the virtual meeting. Make sure to adjust the time to your TIME ZONE. The DURATION of the meeting days can be different.

ii. **TECHNICAL INSTRUCTIONS AND PROCEDURE:** The host should inform you about the platform and provide more information about the navigation/actions/reactions. The introduction to the platform could include a link to a video tutorial (e.g. in YouTube). If not, you should look up the tutorial by yourself. Make yourself also familiar with the basic technical rules/procedure: e.g. muting microphone when not speaking; possibility to use "reactions" such as "raise hand" in Zoom, etc.

iii. **GENERAL DATA PROTECTION REGULATION:** Organizers should provide information about the GDPR rules or may request a pre-registration to send an Informed Consent and Information to participants. Participants need to consent to the terms.

2) During the meeting

a. **Starting the meeting: procedural and technical aspects**

i. In some platforms (e.g. Zoom), the moderator/host of the meeting has to allow participants to join the meeting (depending on the moderator's settings the participants are in the meeting as soon as it is started, or in a "waiting room" until the host allows them in). The waiting room may be used also to clarify the identity of participants in order to avoid 'unwanted' participants / participants who may disrupt the meeting.

ii. Once the participants have joined and connected to the event ("are in"), the team member in charge of the technical part could check one-by-one if the participants hear him/her, and vice-versa.

iii.   Moderator(s) should explain the different assigned roles of the organizing team, plus external technical assistance, if any.

iv.   The participant should use in his/her profile the name he/she provided in the inscription (exact match). This will facilitate the identification of the participants for the meeting and particularly in chat or in discussion. Information should be provided of how to rename.

v.   It is the responsibility of the participants to make sure the video/audio settings are correct. In many cases, clicking "join with computer audio" solves the audio issues. It is possible to start a "test"-meeting and try the different settings (microphone, video) before joining the official meeting.

vi.   The host can share his/her moderation rights with a co-moderator. The co-moderator then has the same rights as the main moderator – to lower hands, mute participants, allow screen sharing etc.

vii.   The moderator should explain the etiquette for the virtual meeting. This includes procedure and rules of communication both in advance and right at the start of the meeting and GDPR (see below). Additional explanation about the technical aspects and options could be useful (e.g. how to use the main functions, reactions and buttons). The chat function should be limited to information relevant to everyone, otherwise addressed in private chat. Avoid chat during presentations as it disturbs attention.

viii.   The moderator should inform if the meeting will be recorded (e.g. for later sharing, or for taking notes). This should be announced right at the start by the host/moderator (see items 1.ii and 1.iii). Alternatively, should announce that no recording will be made and/or no pictures will be taken without consent.

ix.   As a default, all participants in the call should be muted when not speaking. The moderator should inform clearly about this at the beginning of the meeting.

b.   During the meeting: procedural and technical aspects

i.   The environment/surrounding of the participants/speakers is crucial for the quality of the meeting (noisy room, loud fan, street noises etc. make listening more difficult for the others). Although this is elementary, participants should be reminded in advance.

ii.   Moderator(s) should explain the agenda and try to keep to the original time allocation in the agenda.

iii.   The messages in the chat can support the discussion (e.g. some raise questions, agree with the speaker, share relevant links/files), but should not overtake the main discussions. The chat should be used only for procedural information. *NB! In case of technical issues during the call (cannot find function/buttons, microphone does not work, etc.), ask for a direct support/help via e-mail or in the "private chat".*

iv.   Take the floor by "raising hands" (in Zoom). The order of hands raised is visible in moderator's view. *(In case there is an issue with this function, you could flag your intention to take floor in the chat.*). In Skype, turning on the microphone can serve as a sign of request to take the floor.

v.   During presentations, the participants may wish to share their screen. In Zoom, when sharing the screen, the following items should be kept in mind:
  1. The presenter can choose which screen/view/document to share. During a PPTX presentation, the actions in another program (e.g. Word) are not visible.
  2. The presenter cannot moderate the discussion, follow the chat and the order of raised hands during screensharing. Support from a co-moderator (or another participant) is required in this case.
  3. When sharing a screen, the default setting for participants in Zoom is full screen view. To see other windows, "Exit full screen" can be clicked (top menu "View options").

vi.   During breaks, make sure that all participants and organizers mute the microphone/turn off the video. It may be advisable to put on music- it helps for a good mood.

vii.   Before leaving the meeting, "save chat" option can be used to retrieve chat information.

c. **During the meeting: format of online meetings.** The format of online meetings cannot just be a 'normal' conference program put online. Most people can manage only a few hours of online meetings. There should be frequent breaks (more frequently than in physical meetings).

   i. Conferences may have to be spread out over more days or even weeks. Spreading a conference or a workshop over several weeks may allow for intermediate discussions among groups of participants and may allow for preparations to advance the level of discussion or decision-making.

   ii. Include more 'fun' activities (e.g. movies, fireside talks, socials), break-out events, live chats, voting during talks on key questions, integrating movies and other media, etc and different ways of activating audience involvement. Even some formal of social interaction, with 'quarantinis', maybe a game or two, an icebreaker, etc. can work well, if done well. The more active participants are, the longer they will stay interested. See also 1) a. xv.

   iii. Formats with online breakout sessions in small groups of participants are promising. After one or two plenary talks, a group of 3-10 people can break out into different virtual 'rooms', discuss the talks and a set of questions/issues, and then possibly report back.

3) Following the meeting

Follow up to the meeting. Communication should continue and round-off after the meeting.

   i. **MINUTES/SUMMARY:**
      1. Usually, a general summary of the whole meeting, including agreed actions, are produced and shared with all the participants.
      2. In some cases, a recording of the meeting could be sent by the host to the ones who could not join the meeting.
      3. After a webinar or an online event, it will be important to report on IUFRO News and if possible prepare related articles, special issue or similar to promote the outputs of the event otherwise the impact is very limited. Preparation of short knowledge products generated from workshops/conferences/training etc should be promoted. These knowledge products can be helpful when accessed by the people who could not participate but wanted to.

   ii. **EVALUATION:** It is always useful for the host to receive feedback and comments on the meeting. Both positive and negative feedback should be raised. Feedback may be collected electronically towards the end of a meeting or afterwards. A report on the event could help to adjust the actions. IUFRO could prepare and share a questionnaire on the event to be completed by the organizers and a survey to be answered by participants and presenters. What worked well, and what should be avoided?

SOME KEY TAKE-AWAYS:
   ● In order to have an efficient and meaningful meeting, the preparation is the key.
   ● Virtual meetings are ideal for the purpose of sharing information, less ideal for deep scientific discussion/debate/group work.
   ● More time is needed virtually to discuss and conclude on a specific issue (as compared to the face-to-face meetings).