

# AFS Virtual Meeting Guide

AFS Meetings Team: [Steven Kambouris](#) and [Shawn Johnston](#)

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## I. Section 1: Introduction

- a. Managing the transition from physical to virtual meetings can be confusing, stressful, and unfamiliar. The goal of this document is to provide a roadmap for creating and successfully executing a virtual meeting. If you have any questions about this guide, please contact [Steven Kambouris](#) and [Shawn Johnston](#) of the AFS Meetings Team.
- b. A special thanks as well to the other organizations managing their own physical to virtual meeting transitions. The information shared between our organizations has been of great help and is a testament to the collaborative power of the nonprofit community.

## II. Section 2: Selecting Your Virtual Meeting Provider

- a. Selecting your virtual meeting provider requires knowledge of what features and user experience you want for your meeting, as well as knowledge of virtual meeting providers available. Below, these features and considerations are discussed.
- b. **Tiers of Providers:** there are three main tiers of virtual meetings. The characteristics of each of these tiers are outlined below.
  - i. Tier I
    1. Tier I virtual meetings are the lowest tier. They are the least resource intensive, least costly, but also provide the smallest amount of features. The features included are a collection of live streamed video sessions and possibly a meeting website with minimal aesthetic enhancements.
    2. The “AFS Virtual Spring” meeting – a collection of prerecorded presentations which were live streamed via GoToWebinar – constitute an example of a Tier 1 meeting. This meeting was organized primarily through email interaction, submission of prerecorded presentations via a google drive, and hosting of videos on the AFS Vimeo account.
    3. The cost of this meeting was offset by virtual fundraising efforts and costs themselves were generally limited to AFS Staff time. The video collection, editing, and presentation were handled primarily by three main AFS Staff members while also working with volunteers under the leadership of Aaron Bunch.
  - ii. Tier II
    1. Tier II meetings are considered “mid-tier” options. They require technical expertise and capacity exceeding what is available solely through AFS Staff. These meetings provide advanced features including, but not limited to:
      - a. A dedicated, professional conference website
      - b. Abstract/Symposia collection and scheduling
      - c. Registrant Authentication Search functions for abstracts, authors, presenters, and symposia
      - d. Exhibitor pages (external website links, exhibitor descriptions, promotional videos)
      - e. Attendee profiles and schedule-building functionality
      - f. Some gamification
    2. These meetings offer on-demand content (via the conference website) and live streamed content through various tools (GoToMeeting, GoToWebinar, Zoom, etc.) and technical support via contract with the virtual meeting provider.
    3. The cost of Tier II virtual meetings will vary based on the number of attendees and features selected, but the cost is generally considered to moderate. The aesthetics and gamification are noticeably improved

relative to Tier I solutions, but generally lack the immersive and VR qualities of Tier III virtual meeting solutions.

4. Examples of a Tier II meeting include the [2020 ESA Conference](#) and AFS 2020 Virtual Annual Meeting administered by the Conference Exchange (Confex) meeting provider.

### iii. Tier III

1. Tier III meetings require technology, expertise, and capacity beyond what AFS Staff can provide. These are top of the line meeting providers and have the most polished and immersive feel to their virtual meeting experience. These meetings include all of the features of Tier I and II meetings while also adding VR experiences and increased customer service and support.
2. However, Tier III meetings are also the most financially costly. Some Tier III providers may charge many thousands of dollars for the consulting process alone (before any meeting contract is even signed). For a meeting with 1500-2000 attendees, average price quotes range from \$30,000 to \$50,000.
3. Examples of Tier III meeting providers include Hubb and ISG.

### c. Customer Service

- i. Levels of customer service range from minimal support to an intensive “deep dive” consulting process. The latter describes a virtual meeting provider working intensively with your organization to determine the technology you’re currently using, the connectivity that will be necessary for the meeting, other policy and technological logistics, and various types of support that will be needed for the meeting.
- ii. Determining your desired level of customer service will be a balancing act between desired features and their associated costs.

### d. Compatibility (User and Technology)

- i. There are two main considerations around technological compatibility: user/staff familiarity and compatibility with technological compatibility itself.
- ii. Your organization’s staff must be familiar with virtual meeting technology to use it and explain its use to users (attendees). Training should be planned for your staff and volunteers first, then moderators and meeting organizers, and then, if necessary, attendees.
- iii. Technology compatibility refers to the compatibility between technology currently used by your organization and technology used by the virtual meeting provider. An example of exploring this issue would be the compatibility between the AFS Registration system iMIS and the authentication technology used by our 2020 virtual meeting provider, Confex. In this case, Confex worked with ISG (the owner of iMIS) to create a bridge between Confex and iMIS for registrant authentication.

- iv. Creating such technology connectivity must be kept in mind as it usually entails added costs. In the case of the AFS-iMIS bridge, this effort cost \$3200.

#### e. Configuration

- i. Branding is essential for marketing your meeting. Finding a virtual meeting solution which is highly tailorable to your organization's branding specifications will help your meeting make its mark and feel more immersive and familiar for your attendees.

#### f. Security

- i. You will need to decide if your meeting will be "open" or "closed".
  1. Open meetings do not require authentication, allowing anyone who'd like to join the meeting to do so free of charge. Open meetings tend to maximize attendance but they also negate the possibility of obtaining revenue from registrants. Open meetings also save money that would be spent on authentication solutions.
  2. Closed meetings require that registrants are authenticated when arriving to the conference website. This ensures that only registered and/or paid members are able to access the virtual conference. The benefits are increased control over access and increased revenue via the pay wall. However, closed meetings often have lower attendance and increased costs associated with authentication technology solutions. With that said, the lower attendance concerns can be mitigated by determining a price point which generates revenue but does not become cost prohibitive for attendees.

#### g. Privacy and Online Safety

- i. Safeguarding the privacy and safety of attendees at virtual meetings is an ever-present concern. This can be best accomplished through a combination of internal organizational policy and coordination with the virtual meeting provider. Below, several facets of this process are discussed.
  1. Contract language: there should be a clause within the virtual meeting provider contract which outlines how user privacy will be safeguarded. Best practices for privacy language often ensure that:
    - a. Any data collected by the virtual meeting provider is and remains your (the organization's) property and will only be used as your organization directs
    - b. Users' email addresses will be hidden
    - c. Password protection will be used to hide personal schedules
    - d. Details of user identity and activity will only be shared with your organization's staff and other organizations specifically approved by your organization
  2. Code of Conduct: it is considered a best practice to have a written Code of Conduct uploaded to the conference website and to require

attendees to acknowledge having read it before beginning their interactions on the conference website.

3. How to Engage Virtually: some organizations, like ESA, also post a “how to engage virtually” guidance document on the conference website. Any items not covered in the Code of Conduct (or items worthy of reinforcing) can be included in this document to ensure that all online interactions are respectful. Guidance can also be provided herein which informs attendees about how to best safeguard their data, communicate professionally, and inform them of whom to contact for a redress of grievance or to report a safety or privacy issue.

#### h. Performance

- i. **Performance** is one of the most important factors to consider for optimizing attendee experience. Three main subsections constitute performance: scalability, reliability, and cloud access. Each of these subsections are explored below.
  1. **Scalability** refers to the virtual meeting infrastructure’s ability to accommodate different sizes of meetings. Some Tier I and II providers may have issues absorbing the increased web traffic from larger meetings. If this occurs, the website may seem slow, cumbersome, or frustrating for attendees. This must be diligently researched and avoided because slow connections or frustrating experiences for attendees can cause them to become distracted or disinterested very quickly in the digital age.
    - a. To avoid scalability issues, research the past work of your meeting provider. Have they handled a meeting with your projected number of attendees? Contact other organizations who have used your prospective meeting provider. What was their experience like? Researching the testimonials of previous organizations is crucial to determining if a meeting provider is a viable solution.
- ii. **Reliability** refers to the virtual meeting provider’s response time, customer support, and smooth function of the conference website and its features. Like scalability, ensuring reliability is vital for creating the best attendee experience. Much of this again comes down to the capacity of the technological infrastructure to support the size of the attendee traffic, but reliability additionally includes the capacity and tendency of virtual conference provider support personnel to respond quickly to any problems.
  - a. Is the virtual conference provider proactively monitoring important events and their infrastructure in general? How quickly do they respond to customer questions and requests for help? How quickly do they respond to degraded system performance (ex: slowness on the website)?

- iii. **Cloud Access** refers to the process of remote (geographically separated) users all accessing the same infrastructure via network connectivity. Are network connections stable, smooth, and fast? All of these qualities are crucial toward maintaining the attention and engagement of your attendees.

- i. **Reporting and Metrics**

- i. Virtual meeting providers in the Tier II and III realm often offer extensive possibilities for metrics. Depending on the provider and tools used, you can gather data on:
  1. Attendee engagement
  2. Attendance at various events
  3. Dropoffs or changes in attendance during an event
  4. Areas of the website or types of events that received more or less traffic
  5. Customer feedback on the conference itself
- ii. The price associated with metrics and reporting will vary based on the meeting provider and the data requested, so this is a topic that must be explored with the virtual meeting provider.

- j. **Ease of Use**

- i. Virtually all of us now have a handheld computer via our phones, numerous distractions around the house, and multiple tabs open on our web browsers. In turn, having a conference website which is easy to use is more essential than ever (lest attendee attention drift elsewhere). Be sure to review customer testimonials and conduct numerous demos and tests if possible to ensure that your virtual meeting provider's features and services are easy to use for people of varying degrees of technological proficiency.

### III. **Section 3: Defining Your Meeting**

- a. Defining your meeting is important for many reasons, but the primary reason is to give yourself a realistic view of what your meeting will require in terms of resources, money, and time. Many important points for consideration which help you define your meeting are explored below.
- b. **Branding**
  - i. Finding the right branding for your meeting is important to tie the meeting to your organization, its goals, and its membership and attendees. Ensure that the meeting provider or solution you choose is customizable so that this branding can be included on the conference website. This will create a more professional and familiar environment for your attendees.
- c. **Date and Time Selection**
  - i. Where are the majority of your attendees physically located? When is their workload or time in the field most intensive? What time zones are relevant to attendees for your meeting? All of these questions and more must be considered when selecting your virtual meeting's date and time selections.

- ii. Also important is what's known as "attendee fatigue". Generally speaking, people begin to "burn out" or lose interest when virtual events last for too long. It is recommended that virtual meeting programming does not last more than several hours on any given day and that breaks be used to allow people to grab a snack, stand up and stretch, or simply unplug from the virtual world for a bit.

#### d. Logistics

##### i. Approximating Attendance

1. Projecting attendance for a virtual meeting can be difficult, especially if it's your first time transitioning from physical to virtual meetings. Based on research thus far, the registration rate (pay wall) for the virtual meeting is an important determinant in projecting attendance.
2. At meetings without a pay wall, virtual meetings have commonly had attendance which exceeded their physical meeting records significantly. At meetings with a pay wall, attendance relative to "normal" physical meetings has shown mixed results depending on the cost of registration.
3. With that said, the good news with virtual meetings is that many physical meeting costs for attendees (food, transportation, hotels, etc.) can be avoided, hopefully leaving more funds available for meeting registration.

##### ii. Number of Sessions

1. Determine the number of live, video streaming sessions you'd like to have. These live sessions will be the most direct drain on resources, as each meeting will require a GoToMeeting, GoToWebinar, or Zoom license. These licenses can be bought and maintained by your organization, or your organization can "rent" these licenses from your virtual meeting provider. Renting the licenses can often result in savings relative to maintaining the licenses yourselves.
2. The opposite of your live sessions will be your prerecorded, on-demand content. It is highly encouraged that most individual presentations and most content be conveyed through on-demand, prerecorded presentations. This on-demand content affords a lot of flexibility for your viewers/attendees and reduces the resource costs for your virtual meeting provider and your organization.

##### iii. Number of Speakers

1. Determine the number of live speakers you will be having during your live sessions. Knowing this number will help you best select the appropriate video streaming tools and licenses.

#### iv. Sponsorships

1. Obtaining sponsorships for a virtual meeting is very important to the financial success of your meeting. Further, if enough sponsorships can be obtained, you may not need to have your meeting behind a pay wall.
2. Maximizing sponsorships also means finding effective ways to communicate to your sponsors the return on investment they will realize through their contributions. Be sure to research the features available with your virtual meeting provider which will highlight your sponsor's contributions and maximize their interaction with your attendees.

#### e. Current Technology in Use

- i. Identify those forms of technology that your organization already uses, and which will be important during the virtual meeting. Virtual meeting providers will need to know about these technologies so that they can find solutions for crosstalk between their systems and yours.

### IV. Section 4: The Physical to Virtual Transition

#### a. Planning the Shift

##### i. Assessing Your Resources

1. Knowing what resources you have on hand is key for virtual meeting planning. The primary resources we'll focus on now are expertise, personnel/time, technology, and money.
  - a. Expertise in this context refers to the skill sets possessed by your staff and/or volunteers. Do you have someone skilled in web design?
  - b. Personnel and Time describe the number of staff or volunteers you have as well as how much time they have to devote to virtual meeting planning and execution. Based on your meeting design, how much can your staff and volunteers handle and how much will require outside help?
  - c. Technology refers to the technological tools and infrastructure you already have on hand. Do you have a customizable website? Do you have a registration system? Do you have a google drive, Vimeo account, or other means for remote collaboration and storage?
  - d. Money obviously refers to the amount of currency you have which can be dedicated to the meeting. How much can you accomplish with on hand staff and resources? Are your on hand resources sufficient to execute the type of meeting you want to accomplish? If not, how much money is available to purchase services from a virtual meeting provider?

## ii. Determining the Cost

1. The cost of your meeting will depend largely on the desired tier of your meeting, the desired level of attendee experience, whether your meeting is free or behind a pay wall, and how much you can accomplish with the resources you have on hand.

## iii. Converting the Content

### 1. *Determining Your Programmatic Format*

- a. Does the meeting you envision have mostly on-demand, prerecorded content, or will the meeting be largely live content? Do you plan on having plenary sessions, business meetings, workshops, and virtual happy hours or other special events? Review the program structure of your previous meetings, what worked or didn't work, and consider each type of event in the context of an online meeting.
- b. Not all types of events translate well into virtual events, and always be sure to keep attendee engagement and fatigue in mind when planning your program schedule.

### 2. *Live Streams*

- a. Live events are the most engaging for attendees, but they also require the most care and attention. Live events are also the most prone to issues. What if your primary speaker or organizer loses their connection or has technical difficulties?
  - i. Some of these issues can be mitigated by having multiple organizers or moderators to maintain the call should one organizer drop out. Additionally, having shared access to the needed files, folders, and schedules can minimize disruptions from technical issues during live streams. However, the fact remains that if live events are not smoothly presented, attendee attention span is likely to wane.

### 3. *On-Demand Content*

- a. On-demand content is the safest form of content to use in a virtual meeting. It offers temporal flexibility for attendees (they can view presentations at their leisure) and it allows presenters to create smooth, polished products before uploading them to the conference website.

### 4. *Mixed Media*

- a. Generally speaking, many meetings use a mixture of live and on-demand content. Finding the right balance of these two types of media requires a careful planning of the program schedule and consideration for your attendees, their time zones, attention spans, familiarity with technology, and other factors.

## b. Choosing the Correct Tools

i. *Streaming Services*: selecting the best streaming service requires researching each service's capabilities and their compatibility with your attendees. Some streaming services, like Zoom, are currently not permissible for federal employees to use. Be sure to poll your attendees to find out what policy restrictions are in place and how they may limit your choices.

1. Many streaming services exist for live sessions, but a few of the most commonly used are:
2. GoToMeeting
3. GoToWebinar
4. Zoom
5. Microsoft Teams
6. For more details on the capabilities of each live session streaming service, check [AFS' comparison tracker here](#)

## ii. Mobile App

1. Is a mobile app needed for your meeting since everyone will generally be viewing the meeting through their laptops or desktops? To answer this question, you must again consider your attendees, what they'll be doing during the meeting, their familiarity with technology, and the price of mobile apps

## c. Planning and Setting Deadlines

i. If you're working with an outside virtual meeting provider, you'll need to work closely with them to determine how much lead time they need for various tasks. Ensure that your program committee and the virtual meeting provider communicate frequently to set these deadlines.

## d. Communications

### i. *Branding/Rebranding the Event*

1. Branding is essential for marketing your meeting. Finding a virtual meeting solution which is highly tailorable to your organization's branding specifications will help your meeting make it mark and feel more immersive and familiar for your attendees.

### ii. *Websites*

1. *Organizational Website*
2. Ensure that your organization's website effectively advertises your virtual meeting and ensure that the information on your website does not conflict with the information posted on the conference website administered by the virtual meeting provider. Linking, for various functions, from your organizational website to the conference website will also be essential (abstract submission, schedule at a glance, etc.).

### iii. Conference Website

1. If you're using a virtual meeting provider, the administration of the conference website will be their responsibility. The delineation of responsibilities between the provider and your organization should be outlined in the contract. If you would like assistance in reviewing your contract, please contact Steven Kambouris and Shawn Johnston of the AFS Meetings Team.

### iv. Mobile App

1. Is a mobile app needed for your meeting since everyone will generally be viewing the meeting through their laptops or desktops? To answer this question, you must again consider your attendees, what they'll be doing during the meeting, their familiarity with technology, and the price of mobile apps

### v. Social Media

1. Having social media tie-ins for the conference website is very important. Most young and aspiring members, and indeed much of society, now communicates through social media. As such, social media is an important recruiting tool for your organization and for attendance at the meeting.

## e. Demos and Testing

- i. While researching your meeting provider and the technology relevant to virtual meetings is crucial, having numerous demonstrations and tests of the technology is still necessary. You should adopt the perspective of an attendee and essentially do a walkthrough of the conference website and its most important functions. NEVER let the first exercise of technology be when attendees are using it!

## f. Executing the Event

### i. Live Event Hosts and Organizers

1. For live virtual sessions, always have a minimum two, geographically-separated organizers on each call. This way, if one organizer is disconnected for some reason, the call (and all of its attendees) will not be dropped.

### ii. On-Demand Presentations

1. As stated above, on-demand content is the most flexible, lowest risk form of content at a virtual meeting. How long you allow the on-demand content to be available to users is up to you, but it will require coordination with your virtual meeting provider.

### iii. Live Q&A

1. Live Q&A can be a great way to generate engagement amongst your attendees. Some virtual meeting providers will allow presenters to set

specific times for their live Q&A and post those dates/times on their abstract page on the conference website.

#### iv. Staff Roles

1. Ensure that all of your staff are actively engaged with the virtual meeting and maximally trained on the use of virtual meeting technology. This will give you maximum contingency solutions for various issues, and it will help you minimize costs by accomplishing tasks with minimal outside assistance.
2. Further ensure that all staff and volunteers are aware of their roles and responsibilities and provide a tracker or other solution that displays the points of contact for all important meeting functions.

#### g. Engaging Attendees

##### i. Communication

1. Use frequent eNewsletters, social media, emails, and other means of communication to keep your attendees, exhibitors, and sponsors informed of important dates, training events, and other news relevant to your meeting.

##### ii. Conference Materials

1. As soon as possible, have a “save the date” virtual document ready to advertise your meeting. With a virtual meeting, other materials are reduced relative to a physical meeting.

##### iii. Interactions

1. Data shows that the most engaging form of content is live video sessions, but experience also shows that live sessions carry the highest amount of risk due to technical issues or missteps of a presenter.
2. We recommend a mix of the two forms of media with on-demand content constituting most of your content, though this can vary based on the scale of the meeting.

##### iv. Video Statements

1. Short, promotional or informative videos can be used with great effect during virtual meetings. These videos can be from your organization, your exhibitors, or your sponsors.
2. Playing such videos at the outset of prerecorded or live sessions or having promotional videos available at other locations on your meeting website can serve as tangible, immediate signs of a return on investment for your sponsors and exhibitors.

##### v. Virtual Happy Hours

1. At the end of a day of virtual programming, it's important that attendees be able to relax and unwind. Virtual happy hours are one way

to accomplish this goal, and they can serve as enjoyable networking events.

vi. Maximizing Sponsor and Exhibitor Value

1. As stated above, short promotional videos are a great way to highlight your exhibitors and sponsors. In addition, your conference website should have a way to display exhibitor and sponsor logos and indicate differing levels of sponsorship. The more value you can demonstrate for your exhibitors and sponsors, the more they will generally be willing to participate in and contribute to your meeting.

vii. Post-Meeting Considerations

1. *On-demand Content*

- a. How long would you like your meeting's on-demand content to be available to attendees? Would you like to have this content behind a pay wall? Would you like to eventually offer the recorded content to people who haven't paid for the meeting? All of these questions must be considered.

2. *Mobile App*

- a. If you've opted to use a mobile app, the same questions asked above will also apply to the mobile meeting app.

viii. Measuring the Results and Improving for the Future

1. *Attendance*

- a. Measuring attendance for your meeting according to various demographics (ex: membership types) will be important in revising and tailoring your marketing campaigns in the future.
- b. If you have a Tier II or III virtual meeting provider, you may also be able to obtain additional metrics on attendance which shows not only general attendance at various events, but changes in attendance during the event. Ask your virtual meeting provider what metrics they can gather.

2. *Interaction and Engagement*

- a. When dealing with virtual meetings, interaction and engagement is incredibly important. Did an attendee show up to an event but then not participate in discussions? Did they show up and quickly leave? If so, why? Was this a pattern for many attendees, or was it limited to a few outliers?
- b. Finding answers to these questions will help you to revise and design your virtual meeting and its program to maximize attendee interaction and thus the return on investment for attendees, exhibitors, and sponsors.

### 3. *Surveys*

- a. Including surveys at the conclusion of your virtual meeting is another very important feedback tool. Make sure you adhere to best practices in survey design and keep track of changes and patterns in survey results. Match these changes and patterns to their relevant virtual meeting events and you'll set yourself on a path to continual improvement for your virtual meetings.

### 4. *Cost Efficiency*

- a. A complete review of the revenue and expenses of your meeting isn't only important in planning – it's also important in post-meeting assessment. Use the metrics and survey results you've gathered to improve events and features, remove events and features, or generate ideas for new events and features. Doing so will help you maintain high rates of cost efficiency.