Moving a Conference from Iceland to Zoom

Best Practices and Lessons Learned from Arctic Science Summit Week 2020

Arctic Science Summit Week (ASSW) is an annual gathering of Arctic researchers and research organizations, convened by the [International Arctic Science Committee (IASC)](). ASSW provides a venue for coordination, cooperation, and collaboration on Arctic research.

ASSW2020 was hosted by the Icelandic Centre for Research (Rannís) and the University of Akureyri, and it was originally scheduled as an in-person meeting in Akureyri (Iceland) from 27 March to 2 April 2020.

This report is based on the first-hand experience of the ASSW2020 organizers, individual communication between the organizers and the attendees, and on the results of an attendee survey (123 responses with an encouraging response rate of 19%).

Background

The first confirmed case of COVID-19 was discovered in Iceland at the end of February 2020. By the beginning of March, authorities started hinting at upcoming restrictions on gatherings and assemblies. Until then, ASSW2020 organizers had been planning an in-person event, with preliminary arrangements to allow for some remote participation. As the circumstances worsened both locally and globally, ASSW2020 was officially moved online on 10 March 2020. The scheduled dates of the event remained unchanged (27 March – 2 April).

ASSW2020 included the following events:
- *Science for a Sustainable Arctic:* a one-day conference focusing on sustainability as well as marine issues in the Arctic, aimed at both scientists and policymakers.
- *IASC Business and Community Meetings:* a three-day event where IASC leadership and Working Groups annually meet. Any Arctic research organization or team is welcomed and encouraged to schedule meetings and events during these days.
- *Arctic Observing Summit:* a three-day biennial Summit gathering together the Arctic observing community to exchange ideas and develop ways to collaborate, share resources, and improve Arctic observing.
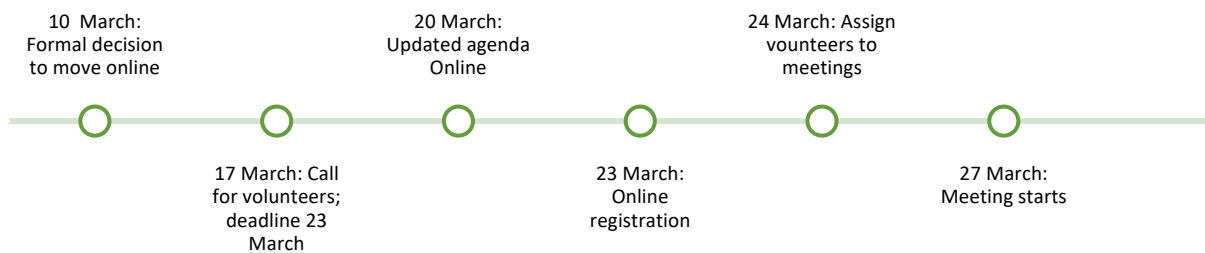
ASSW2020 in numbers:
- **650** attendees…
- …from **28** countries
- **75+** Zoom sessions
- **10** panel discussions
- **5** keynotes
- **2** poster sessions

Moving ASSW Online

An increasing number of resources are available for organizing a successful meeting online. After deciding to move ASSW2020 online *and having consulting some of these resources*, the organizers took many actions, including:
- Clearly communicated the decision to the registered attendees and the public
- Sent regular emails with important information regarding the online transition
- Adjusted staff needs by including IT staff and an extra communication team for AOS
- Stripped back previous agenda and sent out new meeting request form for IASC Business and Community meetings part
- Rescheduled all IASC/plenary meetings and events
- Updated the Code of Conduct & Arctic Lands Acknowledgement for online relevance
- Re-confirmed speakers, rescheduled, and adjusted content for panels and keynotes

- Set-up a (voluntary) online registration system (with PayPal)
- Created Zoom rooms and webinars for each individual meeting and event (link, password (if requested), and host account)
- Updated agenda and online calendar with Zoom information
- Requested, prepared, and distributed pre-prepared materials via YouTube / Dropbox
- Assigned 2 volunteers (Zoom Technician and Chat Monitor) for each Zoom event
- Sent out daily emails during the conference with content summaries and information on how to connect (also posted online and on social media channels)
- Attended / monitored meetings to verify that everything was running smoothly

10 March: Formal decision to move online		20 March: Updated agenda Online		24 March: Assign vounteers to meetings	
	17 March: Call for volunteers; deadline 23 March		23 March: Online registration		27 March: Meeting starts

Personnel Needs and Costs

The overall costs of the event, including the specific staff requirements for the transition online, were significantly less than an in-person event, which is easily explained by savings on rent of facilities and not requiring food and receptions (originally included in the registration). This allowed us to refund 70% of the original registration fees paid for the in-person meeting. Still, there were many sunk costs including planning personnel salaries and facilities deposits. In addition, the transition online required contracting additional IT staff; costs associated with online meeting platform licenses were included in IT staff time. Please note that sponsors and online registrations contributed to the event budget as well.

Personnel needs & time:
- 2 full-time organizers during the 17-day transition period and 7-day conference
  - One focused on meeting rescheduling, facilitation, preparation, and content
  - One focused on communications, volunteer management, and finances
- 5 part-time communications staff to deal specifically with AOS: 10 days
- 3 IT Staff: 16 hours to set up 60 meetings; 7 days (on-call support during ASSW)
- 67 Volunteers: from 2 hours (1 meeting) to 10 hours (several meetings)

These personnel and time needs should be considered a minimum, as ASSW2020 required significant overtime for the staff involved. As an estimate, at least an extra week of time and/or an additional staff member would have made the work load more reasonable.

Volunteers: Volunteers played an important role during the meetings by facilitating technical and meeting support roles which otherwise would not have been covered.
- In exchange for assisting 1-4 meetings, volunteers were offered free registration.
- The only requirements were an interest in Arctic research, a stable Internet connection, and English language skills.
- By the deadline, 67 answered the call. Due to time restrictions, volunteers were not asked to re-confirm their attendance before being assigned to meetings.

- Volunteers were asked to fill the role of Zoom Technician and/or Chat Moderator, so that the meeting organizer could focus on content and hosting.
  - The Zoom Technician was asked to 1) log in as meeting host 2) mute/unmute attendees' audio and video as needed 3) check the recording feature was on (if requested) and 4) share slides / presentations (if requested).
  - The Chat Monitor was asked to: 1) moderate the Zoom chat box 2) notify the meeting organizer when attendees want to talk (using the raised hand feature) 3) facilitate any Q&A session (if requested)
- In addition to a written web guide, volunteers were offered training with two Zoom sessions. These sessions were recorded and shared for that could not attend.

What worked:
- Online training helped volunteers become familiar with their role and Zoom platform
- Additional staff can be an alternative for volunteers: at ASSW2020, the organizers covered the technical and meeting support roles for important meetings/plenaries
- Verified volunteers removed uncertainties regarding performance/ commitment

Lessons learned:
- Changing circumstances may affect the availability of volunteers after they sign up
- Staff still need to be on call at the beginning of each meeting, especially with new volunteers and hosts unfamiliar with Zoom
- If needed, one experienced person can cover both meeting support roles

Registration for ASSW2020 Online

Registration for the in-person meeting was handled by a contractor and was closed in early March. When moving online, and in order to cover costs as described above, organizers:
- Set up an online payment system integrated to the website (PayPal)
- Calculated suggested fees as half of the in-person early bird registration fee
- Immediately communicated that partial refunds would be processed after the event
- Offered the option to waive partial refunds, and apply this waiver to others' fees
- Added all registrants to a central email list for updated communications

What worked:
- Voluntary registration worked quite well in terms of revenue, and also simplified the online transition allowing all information to be open rather than behind passwords.
- Voluntary registration allowed each participant to contribute as much as they wanted or were able to, ensuring wider participation while helping cover expenses.

Lesson learned:
- When setting up an online payment system, expect at least 3 business day for it to be fully up and running, due to time needed with verifications and approvals.

Rescheduling Meetings and Dealing with Time Zones

One of the biggest challenges when organizing online meetings with international attendance is adjusting to time zones and allowing for the fact that people may still have

other responsibilities where they are joining from. Individual meetings were encouraged to think about their core audience when selecting a time for their online meeting.

What worked:
- For the core IASC meetings, a series of three two-hour sessions were held: one for Asia/Europe, a main meeting during "prime time" which was practicable (if inconvenient) from Alaska to Asia, and another session mainly for North America.
- Presentation materials were posted/shared beforehand so that shared online time could focus on conversation and discussion. Where possible, agenda items were repeated in both the Asia/Europe and the North America meetings.

Lessons learned:
- Provide meeting times in multiple time zones, as well as a time zone converter. The European shift to daylight savings during the meeting confused some people.
- The meeting times scheduled for Asia/Europe and North America worked well. To build on these two discussions, the "prime time" meeting should then have been scheduled the <u>following</u> day (rather than on the same day, between meetings).
- Including scheduled coffee breaks was not done but would have both increased the possibility of online networking and allowed for more meeting time.

Online Meeting Platform

ASSW2020 online used Zoom's Meetings and Webinar options. The choice for this specific platform was due to 1) its stability, 2) the broad range of functionality, 3) familiarity of the organizers with the platform and 4) the fact that University of Akureyri, one of the hosts of ASSW2020, had a business license the organizers could use.

By the time ASSW moved online, Zoom literacy among users was growing. In spite of some initial doubts, and some users preferring other systems, feedback and survey outcomes highlighted that attendees did not encounter any particular issues with Zoom, and overall the experience was described as smooth and functional.

The meetings and webinars were set up by IT staff. A link to each individual webinar, meeting, or YouTube recording was made available on the ASSW website.

The organizers took the following steps:
- All panel sessions were done as webinars, to avoid minimize (accidental) disruptions.
- Keynotes were either pre-recorded and posted on YouTube or held as webinars.
- Plenaries were streamed to YouTube to minimize delay in sharing recordings.
- Each individual meetings was set up in a different Zoom meeting room.
- Individual meetings organizers were asked to indicate their preferred settings regarding 1) meeting recording and 2) password protection.

What worked:
- Clear communication of Zoom call-in numbers, in addition to sharing small files beforehand, may facilitate attendance from remote areas with reduced connectivity.

- Zoom's FAQ is indeed an efficient and useful online guide. The ASSW2020 website also reminded attendees of Zoom's test room, and ASSW2020 shared a [guide on How-To Participate in a Zoom Virtual Meeting or Webinar](#).
- In order to facilitate attendees' interaction during a meeting, and to keep track of attendees that want to comment/ask question(s), the "raise hand" feature was used.
- Moderators and meetings host more familiar with Zoom platform made full use of functions like polls and breakout rooms to create more dynamic, engaging sessions.

Lessons learned:
- During one meeting, attendees were kicked out and unable to join the meeting again. This happened because the same Zoom meeting host was used for a different meeting. Avoid using the same Zoom room and host credentials in setting up meetings close in time to each other, allow at least one hour in between, if no other options are available (e.g., using another set of credentials).
- If shared accounts are used, meeting hosts must remember to logout when their meeting is done. If not, they can accidentally mess up other meetings they attend.
- After several wrong attempts, hosts were not able to login with the provided username and password and so IT staff had to provide new credentials. It turned out the meeting hosts accidentally included an extra space when copying / pasting!
- During a panel session, and despite a clear Code of Conduct, an attendee made nasty comments to a panelist. One of the organizers, in the role of Zoom monitor and technician, could kick the user out of the meeting.
- In one meeting, recording was enabled but the recording was completely silent. The Zoom helper dismissed a message informing them that if the meeting host is muted, the recording will also be muted.

Communication

The main channels of communications with attendees for ASSW2020 online were the website (assw2020.is, later supported by aosagenda2020.org) and emails (via Mailchimp), supplemented by Facebook and Twitter.

Website(s): ASSW2020.is was the main website for the event, created about a year prior the event. A couple of weeks prior the event, AOS also developed its own website, a targeted Wordpress site with only the essential components specific to AOS 2020.

Email / Mailchimp: Targeted, comprehensive but concise, and punctual communication play an important role for the event, especially in providing attendees with the right information at the right time. During the event, emails were sent daily with the next day agenda and relative zoom links, available material for the next day, and link to recording if any.

Social Media: The IASC Facebook Group account was mainly used for posting news sent out by email amplified its reach. ASSW2020 organisers used #ASSW2020 with their personal Twitter accounts, and AOS used the @ArcticChange1 account.

These channels work well as more than 90% of survey respondents indicated that they felt well informed, and they did not have any further questions.

What worked:
- Clearly structured websites were the key to helping attendees find information.
- ASSW2020 used the "Add Event" plug-in, enabling users to automatically add an event to their calendar (Google, Outlook, etc.) in the right time zone.
- Limiting the number of emails by grouping together few important messages helped avoid people ignoring or not reading the important emails.

Lesson learned:
- A news section was not included in the original design of the ASSW2020 website, which made sharing important updates more difficult.
- Once a link to an open Zoom Room for networking was shared on Twitter. That room was later Zoom trolled. Do not share links for open Zoom meetings on social media.
- The original registration requested GDPR permission only for communicating ASSW2020 news. This hampered other uses, like building statistics for this report.

Networking

ASSW Online offered two main options for online Networking: an open Zoom Room, and a list with attendees' data to encourage getting in contact. Networking in this format seems to have worked better for groups where attendees already knew each other.

What worked:
- People could make some connections through the participant list and Zoom rooms
- Networking online was feasible/worked for those who already had connections, but it was hard/not possible for the those who were new to the summit.

Lessons learned:
- Some attendees were not added to the open list because GDPR consent for this was only requested after registration; consent should be requested at early stage.
- A more developed Twitter strategy could have improved networking for participants.
- Networking possibilities online are feasible but need to be explored and improved.
- Open Zoom rooms for networking should be always monitored to avoid trolls.

Meeting Content

According to survey responses, the quality of the content was one of the main drivers in the perception of a positive/negative meeting experience. Original content planning for ASSW2020 was initiated approximately one year before the event, and specific events, topics, and speakers began crystallizing about three months before the event.

In the switch to an online meeting, the following steps were taken:
- All meeting organizers / hosts / moderators / speakers were asked to re-confirm their participation in the online meeting. New participants were invited to replace those who were unable to move to the new format; this also allowed for expanded participation by those who were not originally able to participate.
- Keynotes and panel discussions were shifted to better match the contributors' time zones. A "wrap-up" session was removed from the schedule. In addition to recordings / sharing, consider holding multiple iterations of certain discussions.

- Communications emphasized when and where new calendar / scheduling / agenda information would be provided.
- Individual Zoom meetings were held with each individual panel discussion group in the days prior to ASSW to familiarize them with Zoom and the new online format.
- A clear, comfortable moderator (backed up by a competent Zoom technician) was key to a smooth, successful event. The moderator laid out the "rules" (e.g. using the chat or not, using "raise hand" feature) and identified whose turn it was to talk.
- Online sessions were scheduled with at least 15-minute breaks between them, to allow for time overrun and to give time to smooth over any technical issues.
- Acknowledge that some will be more inconvenienced than others; try to consider this balance when hosting your meeting. A limitation here was that most of our key support staff were in one time zone; a distributed team could be better.

Moving ASSW2020 Online: Was it worth it? Evaluation from the attendees.

Moving ASSW2020 online was a very positive experience for the Arctic science community. However, it is important to acknowledge that moving to an online format also amplifies many of the inequalities and challenges by prospective meeting attendees. Caregivers, for example, or others in situations not conducive to focusing on online meetings, were disadvantaged. Weak or unstable Internet connections negatively affected attendance, especially for Arctic residents located in small and remote communities, in particular Indigenous people. Closure of offices, universities, and other public spaces reduced further the capacity of connection and hampered the suggestion of creating "hubs," for example.

How successful did you expect ASSW2020 Online to be?
122 responses

From your experience, how successful did you find ASSW2020 Online to be?
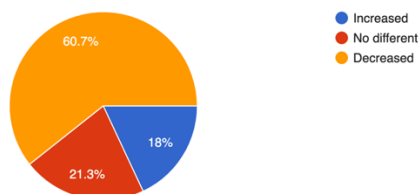121 responses

Legend:
- Very Successful
- Successful
- Satisfactory
- Moderate Failure
- Total Failure
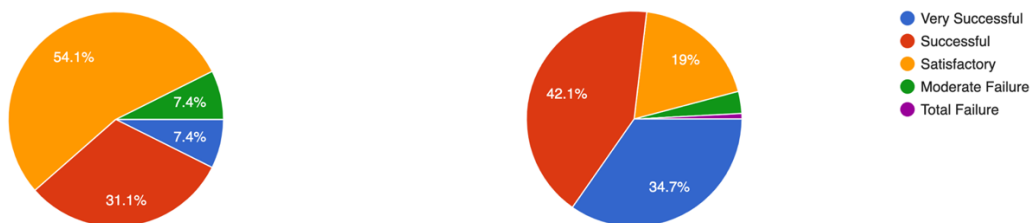
Based on the responses of the post-event attendee survey, participants highlighted that:
- The overall outcome of the event exceeded respondents' expectations.
- The online format was an acceptable alternative to the in-person meeting.
- The online format increased total registration by 17% (482 registrants for the in-person meeting, 81 registrants for the online meeting, and 67 volunteers); some events saw decreased participation, while others saw 3- 4 times the participation they would have expected in-person.
- However, survey responses also indicated that many participants considered that engagement in the online event decreased relative to an in-person meeting. This could be partially explained by the fact that people may have to handle daily responsibilities, especially given the pandemic. In fact, open answers indicated how engagement in the sense of participating more to the discussion through Q&A, or via chat, for example, was very positive.

How do you think the online format influence your engagement in the event?
70 responses
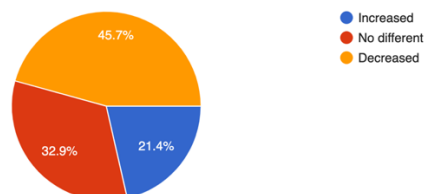
The online format was positively received due to:
- Reduced carbon emissions
- Providing an alternative for those who (for whatever reason) cannot travel
- The possibility to watch recorded meetings in a more convenient time
- Cost savings over an in-person meeting (fees, travel, and other related costs)
- Attendees, especially of annually recurring meetings, perceived an increase in focus and productivity.

Moving Online: Is it right for your event?

The number of meetings remained the same for the parts of the event directly planned by the main organizers (i.e., Science for Sustainable Arctic and AOS) but decreased for the part of the Summit where external meeting organizers were scheduling their events: 31 business and community meetings were originally scheduled, of which 13 meetings moved online. ASSW2020 organizers found that meetings which were more pro-forma, lacked organizational capacity, or with hands-on formats postponed, cancelled, or held their events in reduced forms.

Planning and facilitating meetings is a lot of work – no matter the format. While holding a meeting can sometimes be seen as success in itself, the move online encouraged meeting organizers to reconsider their real purpose and goals and if a meeting was actually useful.

Given the circumstances created by COVID-19, which prevented any in-person meeting to take place, the online format of the summit was a satisfactory and acceptable alternative for the vast majority of the attendees (73% Yes, 21% Maybe, 6% No). However, the general feeling was also that an online format cannot ever fully replace an in-person meeting.

Putting down into words what the online format lacks when compared to an in-person meeting is not easy. It can be translated as difficult in networking, or as a lack of fluidity of in-person interactions. Possibly, the in-person interaction leaves more room for unexpected and spontaneous interactions, which the online format makes more difficult.

Nevertheless, attendees highlighted the positive impact hybrid (in-person and online together) meetings can have, or, in case of annual meetings (like ASSW), to alternate online meeting with in-person meetings. Multiple attendees even suggested that ASSW move online every 2 or 3 years! It isn't a one-sided coin; online meetings provide many options for attendance that in-person meetings do not. For example, both hosts and attendees can build more dynamic and customizable programs to serve a community's goals and mission.

Final Suggestions for Organizers of Online Meetings

- Adjust your meeting(s) to an online format by considering schedules that work across all relevant time zones and embrace shorter / more structured sessions which may require preparation with materials and a shorter clear agenda shared beforehand.
- Relevance of the content for the targeted users' interests is key to engagement.
- Identify the right team, including content, facilitation, IT & communications experts.
- Clear, comprehensive, concise communication is pivotal for positive online meetings.

We hope that this report might help you decide if and how to move your event online! For further information, specific questions or to request documents templates, please contact [*federica.scarpa@iasc.info*](mailto:federica.scarpa@iasc.info)*.*

We thank the partners and sponsors of ASSW2020:

We thank the partners and sponsors of AOS2020: