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Planning a Virtual Conference: Tips from the TOPkit Team

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PLANNING A VIRTUAL CONFERENCE: TIPS FROM THE TOPKIT TEAM

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Introduction

During the summer of 2020, several months into the global pandemic crisis, when most higher-education institutions had transitioned to entirely remote instruction, the Teaching Online Preparation Toolkit (TOPkit) team realized that the upcoming annual TOPkit Workshop also needed to transition to a completely virtual format to accommodate many of our participants' needs. The state of Florida higher-education institutions that the TOPkit team serves had placed restrictions that would make it difficult for employees to travel. Instructional designers, faculty development coordinators and facilitators, instructional technologists, multimedia specialists, and administrators would not get to enjoy the beautiful landscape and event facilities of the University of Central Florida (UCF) campus in March of 2021, but would, instead, have the opportunity to participate in a highly interactive, community-oriented virtual conference facilitated by the UCF team who coordinates TOPkit efforts. The team was faced with this challenge: how to plan a fantastic virtual conference. In critically reviewing aspects to achieve this goal, we will reveal secrets to the success of the TOPkit Workshop planning process, laying the foundation for planning any successful virtual event.

What is TOPkit?

Before revealing the TOPkit team's planning secrets, knowing a little bit [about TOPkit](#) should provide some context for the annual conference. TOPkit empowers those who prepare faculty to teach online and who manage faculty development programs and events with openly licensed resources (found on [TOPkit.org](#)) to use for professional development. TOPkit has an international reach, with 39,210 new users having visited its website since going live on February 1, 2017. The TOPkit Digest monthly e-newsletter provides timely best practices in faculty development, a video tip, and trending topics from the community.

The annual TOPkit Workshop is a conference style two-day experience hosted by UCF for faculty development professionals. For the first two years, the workshop was restricted to professionals who work for public higher education institutions in the state of Florida at no cost. Now it is open for anyone to attend for a modest registration fee. The Workshop still remains free for State University System and Florida College System employees. The upcoming [5th Annual TOPkit Workshop](#) will occur in a virtual format on March 25-26, 2021.

Virtual Teamwork

Creating an engaging virtual conference-style event, like the upcoming TOPkit Workshop, begins with assembling a team of dedicated individuals to make the magic happen. As you set out to plan your virtual conference, take stock of the skill sets needed to make it happen, and then solicit involvement from those with the desired skills. The TOPkit Workshop team is fortunate to have members with the needed skills, from instructional design to event planning to website development, contributing the various functions necessary to conduct a successful virtual conference.

Working together with context, transparency, and accountability sets up a team for success. To accomplish this, the TOPkit Workshop team meets often and communicates through project management tools and emails. As the pandemic continues from month to month, you may find your team needs to collaborate virtually. While working virtually with a conference planning team, best practices for virtual collaboration should be implemented like any other remote collaboration project. Finally, celebrate milestones often to keep team energy going.

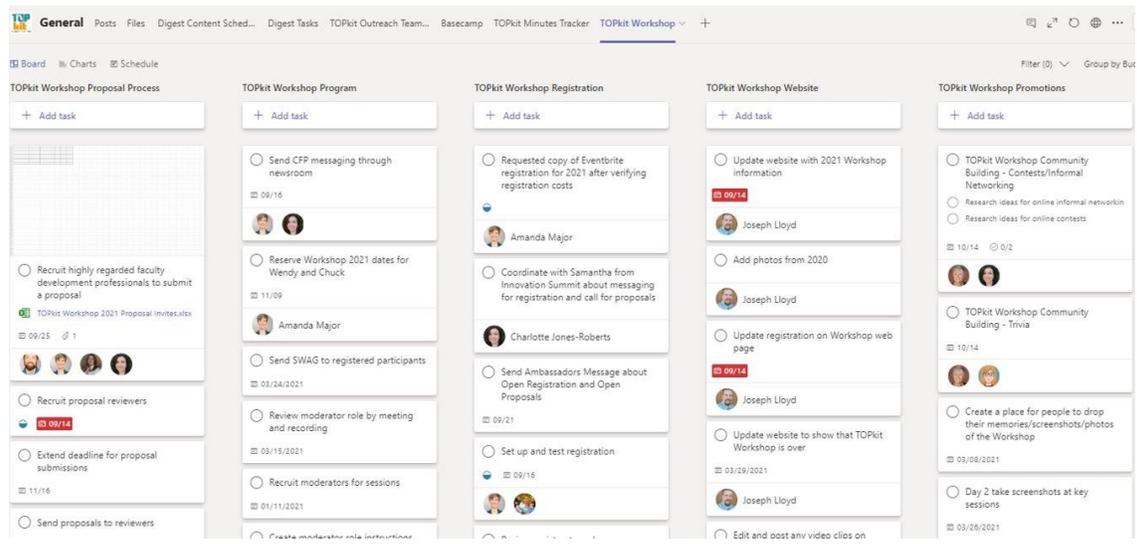
Workshop Project Management

In planning the TOPkit virtual conference, we wanted to re-create the same experiences as we would with an in-person conference, such as sparking inspiration, engaging participants, and fostering networking, but we knew we'd have to plan specifically how to create those experiences in the virtual environment. The TOPkit team planned for the virtual 2021 TOPkit Workshop using project management strategies and tools with the leadership of TOPkit's project manager.

Planning a virtual conference begins with the same general tasks as planning an in-person conference. Our TOPkit project manager first assembled our TOPkit Workshop team. We knew we had to schedule the time and venue, invite speakers, request and review proposals, develop and publish the program, manage the registration, and promote the event. To manage these tasks, we used the Planner tool in Microsoft Teams. Similar tools for project management include Trello, Slack, and Asana.

Figure 1 shows our shared planning board, in which each column was a bucket for the proposal process, program, registration, conference website, and promotions. To manage planning tasks and who addressed them, the project manager created a card for each task in its appropriate bucket. In our virtual planning meetings, the project manager asked for volunteers to take each task, and then she used the tool to assign the task to the volunteers.

Figure 1. TOPkit Workshop Project Management Planning Board



Project management tools allow you to keep track of the progress of tasks; but of course, that does not happen magically. As we worked on our tasks and reported our progress in our periodic planning meetings, we moved task cards through the progress levels from *Not Started* to *In Progress* to *Completed*. This method helped us keep track of and communicate the major and specific tasks that needed to be fulfilled and our progress toward completing them.

Conference Program

One of the most important tasks of planning any conference is constructing the conference program. First, we chose a motivational theme that is current and relevant to a wide audience, and include just enough descriptive elements to make the theme clear, without conveying too narrow of a view, to attract the targeted audience and presenters for the event.

For TOPkit's 2021 conference theme, the planning team with the help of the Chair chose *Charting the Course for Next Generation Learning Experiences*. This theme is fairly broad yet captures the idea that workshop participants will be 'looking forward' in anticipation of the next generation of teachers, learners, and learning tools, while engaging in topics related to planning, designing, implementing, and evaluating educational practices.

In addition to selecting an impactful theme, planning to engage participants through relevant, impactful sessions and socially constructed programming will be key. Careful thought should go into recruiting compelling presenters (and keynote speakers) to increase the level of interest in an event and design for adequate social interaction via community landing pages that contain highlights from the day and after-hours opportunities for continued engagement. We added a functional component to our conference planning solely for the purpose of community building to foster social presence elements such as interaction intensity, affective association, and presenter involvement (Castro, 2019).

Virtual Platforms and Websites

Selecting the platforms for hosting a virtual conference is a vital component of planning a successful virtual conference. Brainstorming presenter, attendee, and conference needs is a good starting place. After conference needs are outlined, beginning to explore applications that will fill those needs and achieve the desired conference experience is advised. Choosing the appropriate platforms largely depends on the scope and services you plan to provide. To provide a good, strong foundation for virtual conference success, look for flexible and affordable tools that will:

- Collect proposal review, participant, and presenter information,
- Meet privacy and accessibility needs,
- Facilitate hosting and dialoguing for synchronous and asynchronous sessions,
- Offer an interactive calendar and conference agenda, and
- Be responsive in a mobile device environment (e.g., web app).

Here are some of the tools the TOPkit Workshop selected to plan our 2021 Workshop:

- UCF web server to post conference information and links to other applications,
- Eventbrite to host the conference schedule and session planner and manage participant registration,
- Qualtrics to collect information from proposal reviewers, proposal submissions, and review proposals,
- WordPress plug-in Mailster that we dubbed Newsroom,
- Microsoft Teams for project management and file storage, and
- Zoom to host session presentations, with opportunities for breakout conversations during sessions for exceeding participant expectations (McDowell et al., 2020).

To ensure that participants of the conference can easily navigate from the conference website home page to the scheduled sessions, consider the organization of your conference platform as well as its accessibility and inclusivity (Bailey et al., 2020). Consider, too, which sessions will be prerecorded, live, or live and recorded for later viewing. The aim is for conference participants to attain and engage with professional information from conference sessions with ease. If communities of practice and collaboration opportunities can develop during the virtual conference using selected applications, this should foster participant satisfaction and conference success.

Communications and Promotion

What are the special considerations for communications and promotion of a virtual conference event? Methods of communicating with your target audience before a virtual conference and keeping your virtual participants informed and engaged during the conference are much like those in an in-person conference.

When beginning to plan a virtual conference, one of the early tasks is to identify the target audience. Do you want to focus on a specific audience, such as instructors, administrators, or instructional designers, or do you want to provide an experience for a broader audience? After the target audience is identified, a next step is to plan your strategies to connect with

them to promote your conference. A key strategy will be to have a centralized website in which to post information about proposal submissions, registration, and other conference information such as the theme, conference chair, and keynote speakers.

In addition to a conference website, you'll need tools to manage proposal submissions and conference registrations. For the TOPkit virtual conference we used Qualtrics for managing our proposal submission process because our university pays for institutional access, and we used Eventbrite to manage participant registrations. Other platforms, such as Google Forms, can also be used for managing proposal submissions and conference registrations.

After the conference website and session submission and registration tools are set up, publicity for your conference will ensure that the target audience is reached. Promotion for the conference can be achieved by sending targeted emails to people who may be interested in the conference. One place to start is with a list of previous attendees, if this is a recurring conference. If planning a unique, niche conference, then word-of-mouth from key specialists in that unique field and snowball techniques could catapult communications about the conference among those who may have interest in attending. Soliciting leads from other colleagues and contacts can be very effective.

While the conference registration is ongoing, promoting the conference in a variety of social media platforms can increase the reach to potential participants. We promoted the TOPkit virtual conference using our organization's accounts in Twitter, Facebook, and LinkedIn. The more social media platforms managed and more followers, the wider the audience reached.

Having a dedicated promotion lead who can focus on promoting the conference can help increase the audience. The more people reached, the greater potential registrations. Without a dedicated social media/promotion lead, a project management tool like Microsoft Teams, Trello, etc. can help manage promotions with assigned tasks, deadlines, and progress/completion checks.

After the conference schedule is finalized, post the schedule in a clearly defined place since everyone will be in different locations. Instructions for how to attend the conference presentations and links to the individual presentations will also be needed. Asking participants to post photos and/or videos is a great way to keep people connected or provide access to people who may have not been able to attend all the presentations that they wished to attend.

The TOPkit Workshop team has made available our virtual event planning template for the 2021 conference. The openly-licensed [TOPkit Workshop Planning Template](#) is organized by months and details the objectives/tasks that we expect to perform from start to finish.

FDLA 2020 Participant Reflections

During the FDLA 2020 Conference, participants in this Planning a Virtual Conference session were asked about their experiences attending virtual conference sessions. Responses included that virtual conferences they have attended thus far have exceeded their expectations in terms of engagement and presentation/presenter quality. A few techniques noted for their effectiveness in getting participants involved included built-in

polls or questions from presenters (e.g., DialedIn), expectations of group participation stated in the session description, and opportunities to build community through video sharing. When participants were asked what ideas they might have for planning their own virtual conference, responses included an evaluation of project management applications and further thought related to assigning roles on the planning team.

Two Live Virtual Events in March 2021

Two opportunities for participating in virtual conferences will occur in March 2021.

The [Florida Online Innovation Summit](#), a live virtual event to be held March 23-24, 2021, will be an opportunity to share and discuss projects being implemented across Florida to advance the state-of-the-art in online learning. These projects seek to push the boundaries of current technology and practice to disrupt existing models and positively impact the constraints of the iron triangle of quality, cost, and access for students. Potential innovative and experimental project categories include:

- Adaptive learning
- Microcredentials / Digital badges
- Next generation eportfolios
- Predictive analytics and dashboards
- MOOCs for credit
- Etext and digital materials strategies
- Competency-based learning
- Immersive video environments
- Creative use of open source materials
- Learning analytics
- Content repositories for sharing digital resources

The 5th Annual [TOPkit Workshop 2021](#) is another a live virtual event that will be held March 25-26, 2021. The TOPkit Workshop provides professional development resources and networking opportunities focusing on faculty development, ideal for instructional designers, in-unit faculty trainers, chairs, and deans. *Charting the Course for Next Generation Learning Experiences* is the outcome-focused theme for the 2021 workshop. We are charting the course so that the next generation of students may be successful. Our work with faculty development is a stepping stone to this outcome, ultimately fostering a culture of quality for online education across the state of Florida and beyond. At TOPkit Workshop 2021, you can share and discover:

- Innovative approaches to faculty development in higher education
- Methods for assessing the effectiveness of faculty development and e-learning
- Lessons learned in adopting new instructional technologies
- New ways to foster a culture of quality for online learning
- Trending instructional design practices
- Collaborative, cross-institutional presentations

Conclusion

TOPkit is more than just the fantastic, highly interactive annual conference with a small community feel.

- Informative content pages and a sample faculty development course are available for adoption and adaption from TOPkit.org.
- Timely posts are offered weekly on social media.
- Monthly faculty development trends are delivered to numerous inboxes via the TOPkit Digest.
- Speed networking sessions and other events delivered in a virtual format are free for anyone to attend.

The TOPkit community keeps professionals in the know with timely tips and fosters the expansion of networks for career progression. Those who would like to connect to TOPkit may do so by [registering on the website](#). Those who have any questions or comments may contact TOPkit@UCF.edu. The TOPkit team welcomes any ideas or feedback you might have.

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