

Hosting a Hybrid Online Conference

*Lessons learned from the LEARN NC
Fall 2009 Interactive Conference*

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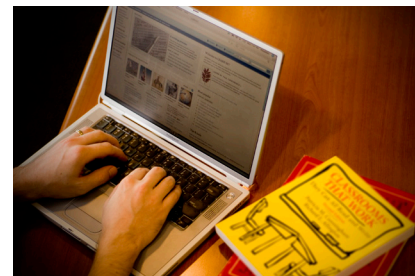
CONFERENCE PHOTOS BY DAN LEWANDOWSKI

In October of 2009, LEARN NC conducted its Fall 2009 Interactive Conference, a two-part hybrid virtual conference with two audiences—one watching online, and one live, face-to-face audience in the room with presenters. This style of conference saw many firsts for both the organization and its participants. We had not done much in the way of broadcasting over the web, let alone planning and staging a live streaming event. Many audience members were also new to the online conference model.

This paper will describe our process for planning and conducting the conference, including what worked, what didn't, and how we'll improve for next time. It's our hope that this document will serve both as a manual for LEARN NC staff in planning hybrid online conferences in the future, as well as a guide for schools and LEAs who want to stage a similar event.

WHY ON EARTH WOULD WE WANT TO DO THIS?

For us, a hybrid conference presented the best of both worlds—the online component allowed people from across North Carolina to attend. The face-to-face component made it easier for presenters, as it's much easier to present to a room full of humans rather than only a video camera.



Approximately 300 people logged in to the LEARN NC Interactive Conference, making it by far the largest conference LEARN NC had ever hosted. Even if educators were willing to travel, hosting that many people in-person would simply not have been possible given the added expense of a larger facility coupled with the logistics of managing a larger audience. By using the hybrid conference model, we could reach far more people than we would have with a strictly face-to-face event.

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PART I: TECHNICAL NEEDS

GET EQUIPPED

As we planned the conference, we determined we needed the following pieces of equipment:

- **Web conferencing software**—LEARN NC used Adobe Connect as our web conferencing software. Other platforms are available, however; organizations hosting an online conference should choose the one that best meets their needs.
- **A fast host computer**—Any web conferencing software requires a decent computer to handle it. As with any software selection, carefully review the system requirements and specifications to make sure your computer can handle a particular program.
- **A computer for presenters**—This is the machine presenters use to show PowerPoint presentations, demonstrate online resources, etc.
- **A wired internet connection**—Connecting via a wireless access point isn't fast enough for this type of endeavor. A wired connection is essential.
- **A video camera**—For conferences or events that necessitate a professional appearance, high-quality video cameras should be used. For small events or meetings, web cameras will be adequate. Note that not all web conferencing software handles video well. Video quality also depends on the connectivity speed of the sender and the receiver, as well as other traffic on your network.
- **Microphones**—Each presenter will need a microphone. At the LEARN NC conference, the lead presenter wore a clip-on lavalier mic, while co-presenters used a hand-held microphone. We also gave a microphone to the Q & A Moderator.
- **Internet access for face-to-face participants**—Though they were in the room watching the presentations, face-to-face participants still should be able to access the web conferencing software so they may interact with online participants.



HINDSIGHT

After the LEARN NC Interactive Conference had ended, we quickly identified ways in which we could improve for future conferences. From a technical standpoint, these items would be helpful for future events:

Your first virtual conference won't be perfect. Don't think it will.

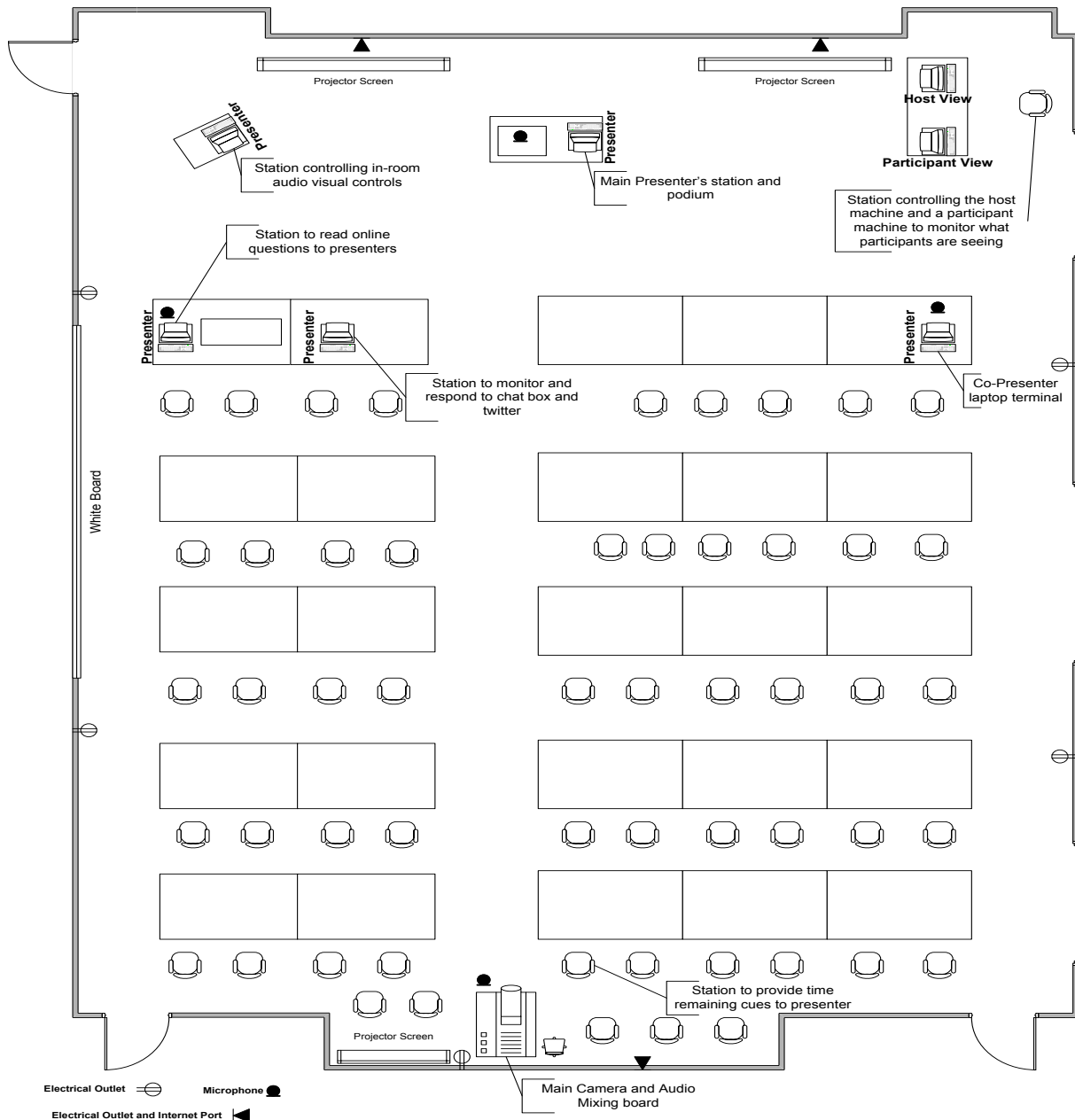
- **A second host computer**—At the LEARN NC Interactive Conference, the host machine was set to a much higher screen resolution than the presenters' computer. This led to difficulties in recording, and resulted in video archives with weird aspect ratios and on-screen content being too small to read. A second computer with a more conventional resolution would result in fewer technical hassles.
- **Additional wireless routers**—We had all the face-to-face participants using the same wireless access point, creating very slow connections for some users. Having several wireless routers serving small clusters of participants would eliminate this problem. Further, don't plug in to a wireless router—this slows down the connection for face-to-face participants using that wireless access point.
- **Lighting**—Upon reviewing conference video archives, the lighting on the presenters appeared dim.
- **Backgrounds**—The room we used had bland beige walls, which were not visually appealing.
- **Another video camera**—A second camera positioned at the front of the room could show occasional shots of the audience, which would create more visual variety. However, doing so would require:
 - **A video mixing board**
- **Battery backup for Host machine**—We used a laptop with a battery for the Host machine, so this wasn't an issue. However, if we ever use a desktop computer, it's critical to have a battery backup. If the host machine loses power or goes offline for any reason, we would lose control over the virtual conference room. Multiple hosts will mitigate this problem as well.
- **A large video monitor for the Technical Support person**—In Adobe Connect, the person running Technical Support had many different pods on screen at once. To accommodate this, Adobe Connect zooms outward, creating many pods with tiny, hard-to-read type. A large monitor would offset this. (For more information on the Technical Support position, please see the **Define roles and responsibilities** section.)

PART II: BEFORE THE CONFERENCE

SET UP THE ROOM

The LEARN NC Interactive Conference required accommodation for two live presenters, remote presenters via webcam, prerecorded video presentations, audio from multiple sources, and switching between multiple video sources. To accomplish this, we set up the room in the manner described in Diagrams 1 and 2.

Diagram 1: Room Setup



This configuration had as much to do with the constraints of the room we used as what we thought would work best. The parameters of the conference space play an integral part in the technical setup, so always make sure to investigate this well in advance.

HINDSIGHT

We stationed the Host at the front of the room, stage left. The presenters were in the center, and the Technical Director station was positioned stage right. In addition, two of the moderators sat in the front row of seats. That meant that, at any given time, up to half a dozen staff members were stationed at the front of the room. This created too much visual action and was distracting for the audience.

SET UP A URL

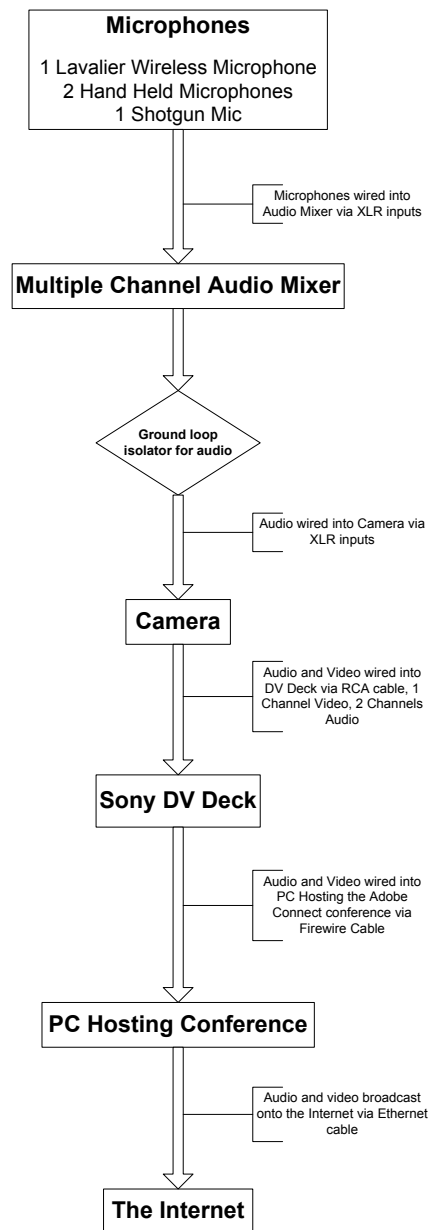
We decided to use a non-secure URL for the Interactive Conference. A secure URL would have required technical staff to set up hundreds of logins for participants, which we felt would create several administrative headaches. To ensure the conference wasn't overwhelmed with unregistered participants, we didn't make the conference URL known to participants until just before the conference began.

HINDSIGHT

The decision of whether to use a secure URL is one of convenience versus security. Our conference was a low-risk event, with no sensitive or personal information being in play, and therefore not worth the trouble of creating hundreds of unique logins. Depending on your content, audience, and comfort level, a secure URL may be the best option for your particular conference.

However, by deciding to make the URL available at the last moment, we opened ourselves up to other difficulties—many audience members were confused about how to log in to the conference. See the **Communicate** section for more details.

Diagram 2: Wiring Setup



MAKE A SCHEDULE

Unlike a face-to-face conference that requires travel, parking, meals, and a host of other logistical considerations, an online conference has few barriers to entry—or exit. However many people you get to log on, you risk running them off if you have long periods of dead air or if you don't stick to the agenda. If a face-to-face conference session is irrelevant to you or if it ends early, milling around the conference site is a lot less hassle than grabbing your coat and trekking to the parking lot. At an online conference—especially if you're only running one session at a time—attendees can leave with a mere mouse click. Maybe they'll log on again. Maybe they won't.

As such, it's vital to create and publish a schedule well in advance of the event so participants will know what to expect. When the day of the conference arrives, it's equally important that you don't deviate from that schedule so as not to confuse people.

An online conference has few barriers to entry—or exit. Don't bore people away with dead air.

An online conference is much like a television broadcast—participants will log on at a specific time expecting to see a certain presentation. If a presentation on online courses runs long, you risk alienating participants who were expecting to see the presentation on technology integration during that time slot. If a session goes too short, you'll bore participants away with dead air.

Keep in mind that even if you hold people's interest, online participants will log on or drop out throughout the event depending on their schedule, whether a presentation is relevant to them, or other innumerable factors.

HINDSIGHT

When making a schedule, carefully consider which sessions to include. After LEARN NC's 2009 conference, the staff generally agreed that we tried to include too many presentations for the amount of time we had available.

The online portion lasted from 1 p.m. to 5 p.m. During that time, we held twelve different sessions, ranging from ten to thirty minutes in length. Some presenters felt rushed, or had to cut significant portions of their content. Additionally, between each session, we had two to three minutes of transition time, further chopping up the flow of the conference. For future conferences, we plan on reducing the number of presentations and giving each presenter longer time slots.

DEFINE ROLES AND RESPONSIBILITIES

Setting up a hybrid online conference takes the combined efforts and expertise of several individuals. The following is a list of roles we used for the LEARN NC Fall 2009 Interactive Conference.

- **Host**—Like the director of a television broadcast, the host controls all the information that participants see. He or she is in charge of changing the display from cameras to PowerPoint presentations, prerecorded videos, images, web resources, and turning presenter microphones on and off. John Huppert did a great job in this role for LEARN NC at the 2009 conference.
- **Presenters**—The role of the presenter in an online conference is much the same as it would be in a face-to-face conference. The differences will be noted later.
- **Moderators**—Using Adobe Connect, LEARN NC had a moderator for:
 - An informal chat room
 - A question and answer forum
 - Technical support (For more information on moderator responsibilities, see the **Engage the Backchannel** section.)
- **Camera Operator**
- **Sound Operator**—We had one person running both camera and sound. If you wish to add additional cameras or microphones, additional staff would be necessary.
- **Timekeeper**—One person was charged with monitoring how much time was left in each presentation. At the appropriate time the Timekeeper held up large, clearly-printed signs stating there were five minutes, two minutes, or one minute left in a presentation time slot.



HINDSIGHT

Though the Interactive Conference was a success, we realized it could have gone smoother personnel-wise. While everyone had a job to do, two individuals wound up with markedly more responsibilities than the rest of the staff. Phil Kaufman served as the technical manager, and Bobby Hobgood was the production manager. Both found themselves doing many tasks that could have been farmed out to other staff members.

COMMUNICATE

So you've gotten the word out about the conference. People are excited about it and want to check it out. But getting people registered is only the beginning. Plan to have continuous contact with online attendees from the moment they register until after the conference is over.

The online-conference model may well be the wave of the future, but the attendees of the present are still generally unaccustomed to this sort of event. Letting participants know what to expect at a virtual conference can save several administrative difficulties and technical support calls.

When communicating with participants before the conference, make sure to hit on these important details, probably more than once:

- Where and when to log in
- Technical requirements to participate in the conference
- A brief description of what participants will see when they enter the conference
- Guidelines for users with low bandwidth

HINDSIGHT

Just before the conference, we sent out emails to participants that included the URL they needed to log in to the conference. We did not, however, put the conference URL on the main LEARN NC website. Several participants called Technical Support to ask how they could log in.

One of the culprits was our email software. We used SendBlaster, a mass emailing program, for several communications with conference attendees. Many email spam filters are highly attuned to these sorts of mass emails. As such, some participants never received information from us about where and when to log in.

A helpful resource for preparing conference-goers would be a screencast about how to use the conference management system. There are several free tools that can do this, including ScreenToaster, Jing, and Screencast-o-Matic, as well as pricier software like Adobe Captivate. Doing so could lead to a smoother conference experience for first-time virtual conference participants.

REHEARSE

Your first virtual conference won't be perfect. Don't think it will. The number of technical and personnel considerations that go with a virtual conference require a large amount of rehearsal, from a technical standpoint and for the presentations themselves. The LEARN NC virtual conference included multiple microphones, displays, and presenters at remote locations. There are far too many variables to expect to show up and wing it during the conference. This level of production needs to be practiced several times in advance to look professional. As such, we held two rehearsals for the technical staff in addition to a dress rehearsal that included the presenters.



Tip: If presenters plan to use PowerPoint presentations, set a deadline in advance of the first technical rehearsal by which time they must submit their files. This will ensure the director knows which file to use and can practice switching to it.

In the technical rehearsal, we set up and tested the video camera, the speaker system, the digital projectors, and the screens. The Host practiced switching the video output from the camera to PowerPoint presentations to websites, and also rehearsed the audio cues. Managing the audio proved to be a complicated process. In addition to the microphones in the room, we at various times used audio from video files or from webcam broadcasts of presenters in remote locations. This audio originated from the Host computer.

The Host audio was transmitted over the loudspeakers in the conference room so as to be heard by the face-to-face audience. If the microphones were live at the same time as the audio from the speakers, it would trigger a cacophony of feedback, and induce cringes from anyone within earshot. We successfully made it through the conference without any audio feedback, a feat made possible by hours of practice. For more details on our sound setup, please review the **Room Setup** section.

After running two technical rehearsals, we ran a dress rehearsal. Some presenters ran through their presentation as if it were live, and others gave simplified versions and focused on coordinating camera and PowerPoint cues with the Host. As the conference runs on a broadcast schedule, the more like a live presentation these rehearsals can be, the better so as to make sure presentations do not run over or under time.

HINDSIGHT

For our next virtual conference we'll also prep staff members on effective presentation strategies. Most of our presenters did not fully engage the face-to-face audience—a failing that came across on the video broadcast.

PART III: DURING THE CONFERENCE

COORDINATE VIDEO SETTINGS

We recorded the conference sessions through Adobe Connect so we could make them available for viewing on the LEARN NC website. However, the recording was done from the Host computer, whose monitor was set to a much higher resolution and wider aspect ratio than the presenter's computer. The resulting video archives looked small and squashed when played back on standard monitors.

In addition, the resolution for the prerecorded videos was incompatible with the display settings for the Host computer, resulting in video problems during the conference. The reasons for this problem were partially specific to the Adobe Connect platform, though.

HINDSIGHT

In the future we will run a second host machine for recording presentations, with display settings optimized for playback on standard-resolution displays.

CHECK THE SOUND BEFORE EVERY SESSION

During the conference, we experienced some confusion regarding the microphones. For example, there were several instances in which people forgot to turn on their microphones—a problem that was unnoticeable to the Sound Operator until the presenter tried to speak. Furthermore, some staff members' microphones only needed to be turned on some of the time (Moderators, for example), and they would begin talking before their sound could be turned on.

HINDSIGHT

For future conferences, we plan to run standardized sound checks one minute before each presenter goes live. These checks should also be worked into technical and dress rehearsals so both the technical staff and the presenters are used to them.

As for staff members whose microphones don't need to be on all the time, they must make the Sound Operator aware that they are about to speak. Daniel Lunk, the Sound Operator for the Fall 2009 Interactive Conference, suggested making a standardized signal to the Sound Operator (a thumbs-up, for example) that would be given by the person wanting to speak. The Sound Operator must then reciprocate the signal to tell the speaker that the microphone is live. These signals would also need to be practiced in the pre-conference rehearsals to make the action second nature.

ENGAGE THE AUDIENCE

Conducting a hybrid conference has a distinct advantage over a strictly online conference in that most people are more comfortable presenting in front of a live audience than only a video camera. Interacting with a room full of people promotes the sense of having a conversation rather than giving a lecture. In the same way that people can “hear” someone smiling or gesturing over the telephone, audience interaction comes across on video, even when the audience isn’t visible on camera.

Engagement was hard-won, however. Since we had never conducted a hybrid or virtual conference before, we had no idea how the audience would react. During the morning session, the face-to-face audience was vocal and engaged. In the afternoon sessions when the cameras started rolling, however, they got very quiet.



HINDSIGHT

Out of our staff, only Bobby Hobgood had presented at a virtual conference before. Other than Bobby, the live presenters as a whole did not engage the live audience as much as they usually do in face-to-face conferences. Knowing that the audience reacts to being on camera, we’ll know for next time that we have to work harder to get the crowd involved.

ENGAGE THE BACKCHANNEL

Most virtual conference participants communicate via the keyboard. As such, having a backchannel—an online discussion such as a chat that runs concurrently with the live presentations—is essential to the user experience. Each chat room requires a separate moderator. For the Interactive Conference LEARN NC used the following moderators, each with distinct responsibilities:

Merely having chat forums isn't enough. Join the discussion.

- **Chat room moderator**—Participants could talk amongst themselves about the presentations, the conference as a whole, general educational topics, or whatever else they would like. The Chat Moderator added to the discussion or provided helpful information and links that were pertinent to what the presenter was talking about.
- **Question and answer forum**—Participants would often submit questions for the presenters. The Q & A Moderator asked these questions over a microphone on participants' behalf. The presenter then answered out loud to the entire audience.
- **Technical support**—If participants experienced technical problems, they could submit questions to Technical Support staff via a tech support pod in Adobe Connect. Tech Support staff must also be available via phone, email or instant messenger, as someone who was experiencing login problems obviously couldn't use the chat pod.

HINDSIGHT

Adobe Connect's Question and Answer pod was set by default to make all questions anonymous—no one but the Moderator or the person asking the question could see the question. When the Moderator typed an answer in the chat pod, that answer had no question attached to it. Not only was it not helpful to the general audience, but it also led to the same question getting asked more than once. Further, once a question had been answered, it disappeared from the pod. These difficulties can be overcome with additional training for the Moderator, and in the future we will make sure the Moderator is aware of and has time to practice using these features.

Independent of the conference, an additional backchannel sprung up on the social network Twitter, organized under the hashtag “#LEARNNC.” The remarks about the conference were positive, and LEARN NC staff soon joined in the Twitter conversation as well, making for an even more robust exchange of information.

Whether you think an independent backchannel is a positive or a negative development is irrelevant—these conversations will occur with or without your approval. The fact that they exist at all illustrates there are some aspects of a virtual conference that are simply beyond your control. Your best strategy is to try to do as well as you can in the aspects of the conference you can control (presentations, technical production), and be friendly, professional, and engaging in the conversations you can't.

USE A SCRIPT

A broadcast schedule leaves little wiggle-room in terms of presentation time. Using a script for presentations makes it much easier for presenters to know their session is the proper length for their time slot.

STAY ON TIME

The Timekeeper is your friend. Presenters should periodically look over at the Timekeeper to see how much time they have left.

HINDSIGHT

Some presenters acted surprised after seeing they had less time remaining than they'd thought. This looked awkward on camera and in person. A conference is a performance, and the rule of any performance is that the audience doesn't know you've made a mistake unless you tell them.



RECORD SESSIONS INDIVIDUALLY

Adobe Connect recorded all the virtual conference sessions so we could later put them on the LEARN NC website. To enable users to select which individual presentation they would like to watch, it's much easier to split the recordings as the conference is in progress than to go back and edit them.

PART IV: AFTER THE CONFERENCE

POST CONFERENCE ARCHIVES

When exporting the videos from Adobe Connect, we could not successfully get quality videos when using Adobe Connect's Export function. We ended up with low-quality Flash video files that were unsuitable for a mass audience. To mitigate this, we plan to play back the archived sessions in Adobe Connect, then do a video capture of each session using Adobe Captivate software.

Again, these issues may improve or get worse depending on what conference platform you use. This is just another factor to consider when making that decision.

COMMUNICATE (AGAIN)

Send out an announcement thanking everyone who attended, either in person or via the web. Send out another announcement when the conference video archives are available for viewing by the public.

DEBRIEF

A few days after the conference, the LEARN NC staff met to discuss what went right and what went wrong. We established several areas where we could improve on future conferences. We also decided to write this white paper to make sure we'd recorded the process, as well as to make it available to other organizations who wish to conduct a similar event.