A beginner’s guide to planning a national webinar

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The National Forum on Higher Education for the Public Good has hosted four webinars through the uLEAD Network, each addressing a different aspect of postsecondary access and support for immigrant and undocumented students. These webinars are an important part of our outreach, education, and advocacy efforts: they allow a national audience to learn from our expert colleagues at no cost for the audience and minimal cost for us.

There are many ways to run a webinar, and the guide below should help you decide what options are right for your organization, your audience, and your budget.

Find your team

A webinar is a medium for education and communication, and the team you assemble will define what, how, and to whom you intend to communicate. Start thinking about who might fill these important roles.

Institutional partners: You can host a webinar on your own, but collaborating with one or more institutional partners has a number of benefits. Partners can help define the goals and subjects you will address, review content or promotional materials, identify possible presenters, and reach a wider audience. Our partners have included nonprofits (like the National Immigration Law Center), professional organizations (like the National Association of Student Financial Aid Administrators), and campus centers (like UC Berkeley’s Undocumented Student Program).

Internal planning team: We rely on a core planning team of 3-4 people who meet on a weekly basis and communicate frequently by email between meetings. The core team takes on the major planning responsibilities, including communicating with institutional partners and presenters, managing technical requirements, and making sure the planning process stays on schedule. This is a big time commitment, so be as clear as possible about your needs and offer other ways for your colleagues to stay involved (for example, reviewing occasional draft materials or providing support on the day of the webinar).

Presenters: Your presenters are the heart of the webinar, and a clear sense of your subject, goals, and intended audience will be invaluable as you identify candidates. Our webinars have featured 2-3 presenters offering experience and subject matter expertise, as well as a moderator to frame the discussion and introduce each section. The professional roles and experiences of your presenters should reflect both the subject at hand and your intended audience (for example, our most recent webinar featured one presenter from a community college and one from a university). You should also pay attention to representation of race and gender, among other considerations, as you identify and invite potential presenters.

Content and format

Of course, the most important content consideration is your subject matter. This will drive the entire planning process, from inviting presenters to creating promotional materials to making technical
decisions. Your subject matter (and the subtopics to be addressed by each presenter) should guide your decisions on each of the following matters.

**Presentation format:** Our webinars last about 90 minutes, and we try to mix up the format so that our audience does not just hear an uninterrupted lecture. We may have a brief Q&A between presenters or feature a student interview. Below you’ll find the structure of our last two webinars. One of the outlines below may work for you (we used these for our last two webinars), or you may find another format that is a better fit.

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<thead>
<tr>
<th>Sample webinar formats</th>
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<tr>
<td>Moderator-Presenter-Q&amp;A-Presenter-Q&amp;A-Presenter-Moderator</td>
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<td>Moderator-Presenter-Interview-Presenter-Q&amp;A-Moderator</td>
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**Audience interaction:** We include a chat box that audience members can use to ask questions and discuss the topics at hand. We answer some questions directly in the chat box (for example, a request for the link to a presenter’s organization). We address more complex questions during the Q&A period. Using a chat box (as opposed to a question submission box, which many webinar platforms offer as an option) allows audience members to interact with each other in real time. Of course, this means you cannot control the information shared, but the collective expertise of your audience is a powerful resource. At our most recent webinar, participants discussed state-specific policy issues, with some even sharing email addresses to start a working group in their home region. Depending on your goals and the size of your audience, an interactive element may or may not make sense, but it has worked very well for us.

**Q&A:** We reserve a significant portion of the webinar for questions. Audience members can submit questions throughout the presentations (as mentioned above, we prefer a chat box, but there are other options). Our behind-the-scenes team sorts through and pulls out any questions that would be a good fit for a Q&A—typically those that are open-ended, more complex, or guided by professional judgment. We choose a single presenter to answer each question; group answers tend to be messier since our presenters are not sitting in the same room. We use private chat boxes to send a preview of the question to both the moderator *(Here’s the next question to ask [name of presenter]: _____)* and the presenter *(The next question will be for you: _____)*.

**Presenter slides:** Our presenters prepare their own slides and send them to us approximately two weeks before the webinar. We ask for slides in simple black and white with no formatting other than images. We then apply a consistent template to all slides (which is much less time-consuming with minimally formatted slides). We usually add a slide or two for the moderator’s overview of the subject, as well as transition slides introducing each new section of the webinar and a closing slide with a link to our post-survey.

Each section of the presentations should connect to the overarching subject in a natural way—that is, audience members should understand why each topic is being discussed in the context of this webinar. However, keep in mind that your presenters have expertise and experience that you may not have considered when you started planning. Stay open to changes and adjustments throughout the planning process.
Technical considerations

As you make technical decisions, you will likely be guided by three main factors: your goals, your budget, and the technical expertise available to you. The first factor will shape how you use the available technology, while the second and third factors will provide constraints to direct you toward the appropriate technical options for your organization.

**Platform:** We currently use Adobe Connect (and have also used GoToWebinar), but plenty of other platforms are available. Keep in mind that many platforms limit the audience size, or charge more for larger audiences. Important questions include: How many audience members do you expect? What is your budget? How user-friendly are the various options, and how comfortable are you with new technology? Finally, does your organization already have a license for one platform? Thanks to the UM School of Education’s license, we have been able to use Adobe Connect for free. If you have a communications or IT office, check to see if you have similar options (in which case you will likely have formal or informal IT support, another major advantage). Your choice of platform will also be guided by the desired format for your webinar.

**Technical requirements:** Our webinars rely on live audio and a slideshow, which has worked well for us in the past. (Other webinars use live video, which you may prefer.) We ask our moderator and presenters to use a microphone headset to eliminate echo and reduce background noise. We also ask presenters to use an Ethernet cord rather than a wireless internet connection to ensure that the presentations are smooth and uninterrupted. (Depending on the platform you choose, your presenters may be able to call in, in which case they should use a landline rather than a cell phone.)

“Rehearsals”: A few weeks before the webinar, we schedule online meetings with each presenter and our moderator to introduce them to the webinar platform, reiterate the technical requirements, discuss the structure of the webinar, and answer any questions. About a week before, we have a “tech rehearsal” with all of our presenters and moderator during which each presenter quickly runs through their slides. This allows us to identify technical problems, and it allows presenters to see gaps or areas of overlap in the presentations. Presenters may want to revise their slides as a result.

**Software installation:** If your webinar platform requires special software, make sure to tell presenters and registrants as early as possible. Adobe Connect only requires Flash Player, but some other platforms require specialty software or registration.

**Recording:** You will reach a wider audience and extend the webinar’s lifetime if you make a recording available. People who were interested but could not attend will be able to benefit from your information, and audience members will be able to pass the word along to colleagues. Recording capabilities should be a consideration as you choose a webinar platform.

**Accessibility**

You want to reach your intended audience, and it’s important to consider accessibility so that the audience can fully benefit from your presenters’ knowledge and experience. Make sure to be clear in your promotional materials and/or registration form that these options are available.
Captioning: Adobe Connect offers the option of a “pod” where captions appear during the webinar, and many other platforms have a similar capability. We have used Aberdeen Broadcast Services for live captioning, and there are many other professional captioning services you can consider. This can be a significant expense, but very much worth it. Plan ahead so you can include captioning in your event budget, and allow time to work out technical questions with the captioning provider.

Plain text: We send promotional emails with a poster-style image in the message describing the event—it’s eye-catching and allows for visual consistency with our website and presentation template. However, we also include a plain text transcription below the image with the same description as the “poster.” This is helpful for visually impaired recipients who use a screen reader (screen reader programs translate text to speech but cannot translate an image).

Advance copies of presentation materials: Offer advance copies of the presentation so audience members can get large print or Braille transcriptions made. You can provide registrants with an email address to contact or you can include a question about advance copies on your registration form.

This is certainly not an exhaustive list, and you should consider additional practices such as those recommended in the Association of Research Libraries’ Web Accessibility Toolkit. You should also consult with any organizations or offices available to you that may have more information or suggestions. We continue to learn new ways we can make our own webinars more accessible.

Planning timeline

This timeline is not comprehensive, and yours may vary. However, it should give you a rough sense of the important steps along the way, as well as the pacing of the planning process.

3 months ahead of time: Decide the subject of the webinar; identify the planning team; confirm the webinar proposal with institutional partners; choose a date; make a list of people who could serve as presenter or moderator.

2 months: Confirm presenters and moderator; send a timeline including date to turn in slides; schedule a "tech rehearsal" for the week before the webinar; create contact list for email publicity blast; draft promotional materials, including registration form and pre- and post-surveys (we use Google Forms for all three).

1 month: Open registration and send email announcement to all subscribers/contacts (we link to an anonymous pre-survey with our registration page); draft moderator script; confirm captioning service; schedule a call with your moderator and each presenter to introduce the webinar platform.

1-3 weeks: Contact institutional allies who can publicize the webinar in social media or email newsletters; schedule meeting with captioning service to run through technical requirements; collect presenter slides; format presentation; send one or more reminder emails publicizing the webinar.

<1 week: Hold tech rehearsal; give presenters a chance to edit their slides; recruit support crew for day-of-webinar command center (see below); send login information to registrants.
**After the webinar:** Remind registrants to complete post-survey; post recording and follow-up materials (copy of presentation slides, FAQ, resource guide, etc.); send institutional partners summary including registrant data, size of audience, and pre- and post-survey data analysis.

**During the webinar**

On the day of the webinar, our planning team and support crew set up in a “command center,” which should be a quiet area with reliable internet access and space for several computer users (a conference room works well). Depending on your platform, format, and technical needs, your support crew may vary, but we have someone in each of the following roles.

**Audio control:** Mutes and unmutes audio so only the current presenter’s mic is live. This is not strictly necessary if all presenters have headsets, but it minimizes the risk of background noise or interference. (For simplicity’s sake we typically keep the moderator’s mic live throughout the Q&A and mute/unmute presenters as questions are addressed to them.) Should be connected by Ethernet, not wireless. Ideally someone from the core planning team.

**Moderator contact:** Talks to the moderator on a behind-the-scenes chat box. Sends notifications when they will be speaking soon (for instance, as the end of a presenter’s section is approaching). Sends questions for the moderator to ask during the Q&A section and identifies which presenter the question should be addressed to. Ideally someone from the core planning team.

**Presenter contact(s):** Talks to one or more presenters on a behind-the-scenes chat box. Sends notifications when their section is approaching and when their mic is live. Sends a warning when their time is running out. Notifies presenter(s) when the moderator is going to ask them a question during the Q&A section. Ideally someone from the core planning team.

**Chat box monitor(s):** Watches the audience chat box. Answers straightforward questions directly. Identifies possible questions for the Q&A section. Should be knowledgeable about the subject area.

**Timekeeper:** Watches the detailed webinar schedule (which lists starting and stopping times for each section). Announces when presenters are nearing the end of their time so their contact person can get in touch. Helps decide when to end Q&A.

**Runner:** Stands by in case anything is needed—a printout, another Ethernet cable, whatever it may be. Probably won’t end up doing much, but it is good practice to have someone available (and good for your peace of mind).

**Live listener:** Logs on and listens to the webinar from outside the command center to have the “audience perspective.” Alerts you if there are any issues such as audio quality. Like the runner, probably won’t end up doing much.

**Live-tweeter:** Live-tweets.
The command center during our most recent webinar.

Good luck!

A webinar can be a great (and cost-effective) way to reach a national audience and collaborate with partners around the country or across the world. With sufficient planning, good communication, and a clear sense of purpose, this can be an important addition to the services and educational tools you already provide. Make the most of it, and good luck!