How to…
Run an online event

1. Why use this method?

The **benefits** of running online events include:

- Enabling you to reach a larger number of participants than other methods.
- Gathering instant information on what participants think about an issue.
- Recruiting/ inviting participants who fit different (demographic) profiles to get a more representative view.
- Being less resource intensive than face to face events.
- Enabling a flexible range of formats – themed and unthemed breakout rooms, polls, Q&A sessions and enabling participant to contribute directly through shared workspaces.
- May offer more flexibility on the day and time the event can happen.

But, there are some **considerations**:

- Not everyone will feel comfortable attending and participating in online events so they need to be used in combination with other methods.
- Although online events can include a significant number of participants, it may be more challenging for everyone to feel that have had their say. Having a strong facilitator is essential.
- Events in general can produce a lot of information that needs to be reviewed and analysed (feedback from breakout rooms discussions, participant demographic information, questions raised and chat dialogue (if using this), which can become resource intensive.
- There are different platforms that can host online events e.g. MS Teams or Zoom. The Integrated Care Board uses MS Teams. You will also need to think about whether you want people to be able to ask questions verbally as well as use the chat function e.g. a normal Microsoft Teams meeting or whether you would like to run it as a live event, where people are only able to ask questions in the chat.

2. Planning for online events

A. Different approaches to events

Events bring large groups of different people into one discussion space. This offers a blank canvas to use an approach for your event that fits your engagement objectives. Here are some ideas:

- **Webinars/ Q&A sessions** – these focus on **information giving** rather than engaging with participants and seeking their feedback.
- **Deliberative discussions** – these focus on **seeking feedback** and involve smaller groups within a larger event discussing the same topic, or different themed topics. This enables participants to consider an issue in depth, challenge each other's opinions and develop their views/arguments to reach an informed position. Feedback from these smaller groups is often shared with the whole event to understand if a consensus is developing.
- **Appreciative Inquiry** – takes a more **co-production approach**. It follows a specific format and is typically used at an early stage in a project (to vision) when there are no ideas or solutions. The conversation focuses on recognising positives. Participants often need to be prepared beforehand to work in this way and you should dedicate time within the event to explain the methodology.
- **Citizens' Assemblies, Juries or summits** – these focus on supporting **decision making** through debating 'tricky' issues. They bring people together to discuss issues in depth and are presented with information or 'evidence' and reach a conclusion/ decision through a series of recommendations.

The format of your event will impact on the resources and planning required.

B. Identifying roles and responsibilities

Whichever type of event you plan to have, you will need to identify people to undertake these roles:

- Point of contact – communicating with participants before and after the event so that they are booked in, have all of the information and event details that are needed. They follow up after the event to seek feedback and share outputs and outcomes from the day.
- Host – leads the event on the day, keeps the event to time, introduces different speakers and parts of the event (e.g., breakout rooms or other activities).
- Facilitator(s) – responsible for leading conversations (including in breakout sessions) from the ICS perspective and asking the key questions and facilitating the conversations in the break out rooms ensuring everyone has the chance to speak.

- Note taker/chat monitor/ recorder – responsible for accurately capturing feedback during breakout sessions, monitoring the chat (if this is being used) and for finalising information after the session. Sessions may be recorded, and transcription software used with the participants permission.
- Reviewer – responsible for reviewing the outputs from the event and analysing the key themes and trends to be presented in a feedback report.

Depending on how many events you plan to have, and how many participants you anticipate attending, these roles might be performed by one or many people.

C. Creating a session plan

A session plan (see appendix one), prepared in advance, provides everyone within an event a running order of who is responsible for what, when. It sets out the roles and responsibilities, key topics to discuss and key contacts. It is a more detailed version of your agenda.

Read the how to guide on developing effective survey questions to support you to think about what you want to ask. Events primarily focus on asking qualitative questions. However, if you are running activities such as polls and voting (where a decision needs to be made), you may also need to use quantitative questions.

To make participants feel more comfortable and prepared, consider whether you want to share the questions you will be asking and the agenda with them in advance.

D. Working online

Since the pandemic, people have become more comfortable with joining online events. However, don’t assume people know how to access or use certain functions on the platform you are using. Be sure to explain these in your welcome at the event, using a slide with instructions, and send a short guide to participants before they join.

Ensure you have tested all functions and applications well before the event, especially things like breakout rooms, so you are confident in how to use these. Use your session plan to outline a plan B to anticipate how you will deal with issues that might come up i.e., a presentation freezing, video not loading etc.

Think about how you will bring people into the conversation (both during the event and in breakout rooms) – will people need to raise their hand to speak, would you prefer them to comment in the chat? And, how will you facilitate so that everyone has an equal chance to speak?

Gauging people’s reactions can be more challenging online. It’s important to regularly check in with how people are feeling, particularly if the topic is sensitive.

E. Recruiting and preparing participants

Having undertaken your stakeholder mapping, you'll have identified those you want to invite to attend.

To recruit participants, you will need to consider how you will advertise this opportunity. It should be clear;

- What the purpose of the event is,
- When the event is and what platform you will be using,
- How long the event will last,
- What topics participants might be asked about,
- If they need to fit any criteria to participate (i.e. having accessed certain services recently),
- How their participation will influence the project.

For larger scale events (expecting 30+ people or open events like webinars), you might like to think about using a free booking system like Eventbrite to manage the registration process for your event. This will give you a clear idea of how many people plan to attend, and it enables you to ask participants to supply demographic information and consent to record the session/ take photographs when they sign-up as well as sending them any information they need.

Once participants express an interest, find out from them what adjustments they might need to fully participate in the event. This might include things like;

- Taking regular breaks if topics are emotive or traumatic,
- Enabling a support worker or advocate to attend the session with them,
- Arranging online British Sign Language (BSL) interpreters,
- Supplying information about how to use any online video platforms/ technology they may need to engage with and
- Being able to signpost to support services if they feel triggered or upset by what the conversation has bought up for them.

Prepare participants for the conversation by:

- Confirming the event details and any preparation they need to do and,
- Explaining how the feedback will be collected and used.

F. Getting consent

It's important to anonymise feedback received so that individual participants cannot be identified. It is essential to get your participants permission using a photography/film consent form if you want to:

- Take photographs/ videos of them,

- Record the webinar,
- Make an audio recording of the conversation,
- Use their feedback to create a case study/ persona,
- Quote them directly and,
- Use any content on social media or in press releases, webpages, blogs, or in internal or external reports etc.

If you are working with children and young people under 18 you will need parental consent to work with them.

3. Undertaking online events

Before the event:

- Remind your team of the purpose of the event/ reshare the session plan.
- Establish clear roles for anyone who will join (for example notetakers, observers etc.).
- Ensure any external speakers/ panellists understand what is being asked of them and the “slot” they are being asked to attend for.
- Rehearse presentations and time any videos that are being played, so that you stick to the timings set out in your session plan.
- Do a tech check: confirm that screen sharing, recording, etc. works.
- Double-check any links and files open.
- Send confirmation emails and any pre-reading to participants, ensuring they also have the link to join the meeting.
- Consider a pre meet (on a separate link) with all speakers and facilitators
- Set up a background WhatsApp group for facilitators / support staff

During the event:

- Ensure consent is sought to record any conversations/ take photographs.
- Ensure chat records are saved and not lost so that these can be reviewed later.

After the event:

- Review how the event went and consider if the session plan needs to be updated.
- Depending on the type of event, consider developing an evaluation survey with participants so that you can adapt any future approaches or share feedback with speakers/facilitators.
- Begin reviewing and analysing the feedback received, ready to support your decision making.
- If you promised the participant any follow-up communications such as recording, slides, evaluation, identify who will send them and when.

Bibliography:

NHS England (2018): Bite-size guide to patient insight: Building greater insight through qualitative research. bitesize-guide-qualitative-research.pdf (england.nhs.uk)

Appendix one: Online event session plan

Date of session:
Time of session:
Online platform being used:

Supporting staff/roles required:

Role	Name	Contact details
Host (and facilitator)		
Facilitator		
Facilitator		
Note taker (also responsible for chat admin)		

Materials needed

- Engagement presentation
- Link to online tools such as Menti or Jamboard for quick questions / polls / comments (make sure you have downloaded and logged on and tried them out before using)
- Link to put in chat so participants can feedback about the event or let them know that you will send out a link to an online evaluation from after the event

Important information

- Any sensitivities to be mindful of or issues expected to be raised, including lines to take
- Expected number of attendees
- Information about attendees
- Confirmation of whether the event will be recorded
- Link to join the meeting

Suggested session outline

Timing	Content	Lead	Links to slide number(s)
5 mins	**Welcome and working together** ● Timings ● Explaining how the online platform works – if using Microsoft Teams ensure participants know how to use the raising hands function, that they can turn cameras off and on, how to comment in the chat, how to mute their microphones and how we will facilitate ● Chat moderator role ● Agreeing group ground rules – confidentiality and anonymity ● If recording ensure people know and give them the option of turning their camera off ● Ensuring people know that any feedback they don't want to share in the session can be discussed with the facilitator or they can contact the engagement team using the contact information at the end of the presentation ● If anything discussed leaves participants feeling upset or distressed, explain who they can speak to for support ● Explaining that we will take notes and be analysing feedback	Host *(Chat moderator to feed in any questions and comments)*	

5 mins	**Introduction poll**
	● Use a poll, the chat or use the hands up function on Microsoft Teams (depending on number of participants)
	● to ask an introductory questions such as where participants are from or what they like about their area,
	    ● If using a poll, instructions should be shared in advance of the session as well as on the slides
	    ● Host should then talk through poll results
		All	

10 mins	**Purpose and structure of session** **Projected slides cover** ● **Why we're here** - broad background on the project and engagement to date	Host *(Chat moderator to feed in any questions)*	

	• **Why we want to involve you** – to ensure we are putting in place support that meets their needs. • **How this session will influence the project** – we want to gather views to improve NHS services and care • **What we want to do today** Get your views on: ○ Understanding what support would be most helpful to you • **Any Questions?**		
	Intro to breakout rooms Explain purpose of breakout rooms and how to navigate into them. Confirm time available for discussion.	Host	
30 minutes	**Breakout #1** Facilitator introduces themselves and explains how the session will run – using hands up function etc. and how chat will be moderated. Ensure note taker completes feedback in the feedback template. Depending on time the facilitator may want to ask participants to introduce themselves when they contribute their views to save time at the beginning. Possible questions to help you explore issues in the break out rooms 1. ***What works well?*** 2. ***What doesn't work so well?*** 3. ***If there was one thing you could change what would it be?***	Facilitator *(Chat moderator to feed in any questions and comments, as appropriate)*	
	Insert your own activities depending on your event agenda		
5 mins	**Next steps** ***How feedback will inform the project*** • Each session is being written up • Feedback from all engagement activities will be evaluated and written up into a report which will be shared with decision makers	Host	

	• The report will be made publicly available and shared with those who gave their feedback • There will be ongoing engagement to take forward the findings from this engagement activity ***Other ways to have your say*** • Signpost to other feedback methods		
Thanks and close			