



Online Conference Toolkit

Legal histories research cluster

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1. Introduction

The Open University legal histories research clusters has been holding successful online conferences, workshops and seminars for over six years. That does not make us experts, but it does mean we have learned a lot which may be useful to others who organise, or hope to organise, such events. To put it another way, you can learn from our mistakes!

We organise online events because they meet the OU's mission to be 'open to people, places, methods and ideas'. Online events offer obvious benefits. They do not require substantial funding to organise. They do not exclude people who cannot afford fees and expenses, or who cannot get a visa, or because the venue is physically inaccessible. Our conferences have therefore welcomed practitioners and independent researchers, academics at all career stages, and international participants.

However, simply holding an event online does not ensure that it is accessible and inclusive. It also changes the nature of the event: for example, people are more likely to drop in and out of the event, while informal networking or socialising over coffee and lunch are not easily managed. Here again, we hope this toolkit will help.

Thank you to all those who have given feedback on earlier drafts including Helen Rutherford, Leigh Downes, Łukasz Korporowicz, Nandini Boodia-Canoo, and Niamh Howlin.

We welcome your feedback and suggestions on this guide. We would also love to hear about how you have used it.

If you are interested in legal histories (broadly defined), you are welcome to join our occasional mailing list for details of forthcoming events.

Contact us at OULS-LegalHistory@open.ac.uk

2. Initial planning

Obvious as it sounds, the first step is to decide the name and date of the conference (or workshop, symposium, seminar or colloquium: we use 'conference' as shorthand for all these).

A few points to bear in mind:

- A shorter name is better as it will appear in limited-character fields, at the top of tabs, and so on.
- When setting the date, make an initial judgement on how long you may need: is this a one-day event or happening over several days? Can you specify start and finish times yet? (Section 3 will help you to do this.)
- Check for bank holidays, school holidays and major religious holidays. If speakers are likely to come from other countries, consider holidays in those countries too. Also bear in mind, for example, that the Jewish Sabbath begins at sunset on Fridays.
- Do you need any institutional approvals for an event with external speakers?

2.1 Call for papers

The call for papers for an online conference will generally be very similar to one for an in-person event. However, there are a few things to consider:

- Be clear about the timings. As section 3 discusses, 15-minute papers are generally better than (the in-person standard) 20-minute ones.
- Consider which formats you will accept. Online presentations may include videos, virtual tours, and so on – but ensure you are confident you can support these technically.

2.2 Timescale

The timeline for your event will depend on many factors. A good starting point is 3 months from release of call for papers to conference:

- 4-6 weeks from circulation of call for papers to closing date.
- 1-2 weeks for selection of papers and confirmation of programme.
- 4-6 weeks for advertising and booking of conference.

For a more detailed timeline covering the whole process, see section 12.

3. Programme

There are ways in which it is easier to programme an online conference. No one has to travel to and from the venue. Time does not need to be allowed for people to move between rooms, or even buildings. There won't be a queue at the coffee urn.

There are, though, also additional constraints. Audience attention span may be shorter; tech may not work; people may leave and join throughout the day. A good programme will take account of all these.

3.1 Working out timing

There are three questions to consider. How long should the overall day be? How long should each session be? How long should breaks be?

3.1.1 The day

How long should your conference day be? Participants do not have to travel to the venue, but they may still have the school run. They also have distractions such as ever-growing email inboxes. It is therefore still a good idea to keep the day a manageable length and to avoid an early start or late finish.

3.1.2 The sessions

As with in-person conferences, panels of three people/papers are a good standard length. If you have allowed each speaker 15 minutes then the session should be about an hour: 45 minutes of presentation and 15 minutes of questions/discussion. It is worth taking care to organise papers into unified themes as far as possible, so that they talk to each other.

Keynote speakers should of course be allowed more time, but again a shorter session is better. We have found that 45 minutes works well (30 minutes' presentation and 15 minutes of questions/discussion); an hour if the conference welcome and housekeeping are happening at the start.

3.1.3 Breaks

When trying to fit as much as possible in a busy day, it can be tempting to economise on breaks. However, they are at least as important for an online event as a face-to-face one: people still need to go to the toilet, make a drink, or get something to eat. Some will be joining from their work office. It is therefore essential for accessibility and the wellbeing of all participants to include adequate break time.

We find that 15 minutes between each panel is ideal, although 10 minutes will work. 45 minutes is a good minimum for lunch – 30 minutes is just about possible but is demanding for participants.

3.1.4 Sample programmes

Table 1 shows a couple of day-long programmes that have worked for us. We haven't stuck to these for every event! But longer days or shorter breaks have been carefully considered compromises, not the norm.

Table 1 Sample programmes

Example (a)	Example (b)
Keynote and 12 papers	Keynote and 14 papers
10:00 Welcome	10:00 Keynote
10:15 Keynote	10:45 Panel 1 (2 papers)
11:00 Break	11:30 Break
11:15 Panel 1 (3 papers)	11:45 Panel 2 (3 papers)
12:15 Lunch	12:45 Lunch
13:00 Panel 2 (3 papers)	13:30 Panel 3 (3 papers)
14:00 Break	14:30 Break
14:15 Panel 3 (3 papers)	14:45 Panel 4 (3 papers)
15:15 Break	15:45 Break
15:30 Panel 4 (3 papers)	16:00 Panel 5 (3 papers)
16:30 End	17:00 End

3.2 Parallel sessions

Feedback from attendees is that a longer conference is generally preferable to parallel sessions, especially where a narrower theme means that simultaneous panels will all be of interest, and that connections can be made between panels. However, sometimes parallel sessions may be your best option.

Online parallel sessions may seem a daunting prospect. We have hosted them successfully thanks to three principles:

- Have separate rooms set up in advance: don't rely on moving people into breakout rooms
- Share the links everywhere possible: in the joining instructions, on the programme (at the top *and* under every session), in the chat on the day
- Keep to timings so that people moving between streams don't miss anything (including their breaks).

For example, holding a conference on Teams with two parallel sessions, we set up two separate meetings each with their own link. The plenary sessions and one stream were held in room A; the other stream was held in room B. Participants simply left one meeting and joined the other as necessary.

For more on the technological aspects of this, see section 5.

3.3 Time zones

International participants will be joining from their own time zones. These are therefore a factor to account for in planning.

- Planning the programme, note where speakers are based and account for this in allocating them to a session.
- Where speakers are in very different time zones, check with them what works best. For example, Eastern Australia is 10 hours ahead of UK time, so a 10am-4pm day is

midnight to 6am for them. Some speakers would rather get up very early to speak towards the end of the event while others prefer a very late night, speaking at the beginning.

- If a speaker is joining at a more challenging time, eg early morning in their time zone, recognise that presenting is more challenging for them (eg if they have only just started their computer). It might be appropriate to mention this, and thank them for making such an effort to be present, in their introduction.
- Make sure that the time zone for your programme is clear, eg 'all timings are in GMT/BST/UST'.

4. Advertising and booking

Most aspects of advertising are the same as for in-person events. You can, though, advertise your event more widely because travel and visas are not factors. If it is low-cost or free, you may also wish to advertise to non-academic audiences interested in the subject-matter. We have successfully shared events with local historians and genealogists, for example.

4.1 Booking platforms

We don't offer a comprehensive review of booking platforms but share some things we have learned from working with two.

4.1.1 Eventbrite

The platform has various functions including setting the number of available tickets and sending out emails to participants. The latter may be a mixed blessing: there is limited control over the email format (so be careful that vital information is not hidden below generic content), and its standard emails may needlessly clog participants' inboxes.

If your event has a ticket price, then Eventbrite charges fairly significant fees which you can either absorb within the cost or have Eventbrite add as a separate charge. The latter is the default. There are a number of other ticketing platforms with lower costs, although their features also vary.

Do you want your event to feature on its listings? If public, your event will be discoverable by the general public through search and possibly through 'similar event' recommendations.

4.1.2 MS Forms

Microsoft Forms has the advantage of being part of Microsoft 365 packages. It is quick and easy to use, and highly flexible, although its default forms typically looks less polished than

an Eventbrite listing. You also lose many of the automated features Eventbrite offers as well as the payment processing.

If you want more information from participants, then MS Forms offers a wider range of question types. It also offers more scope to customise the appearance of your forms, including with images and background colours.

Some institutions use Google rather than (or in addition to) Microsoft, and Google Forms is a similar option.

4.2 Booking form

The booking process is an opportunity to share information in both directions. You can include the key details of the event, and (we would suggest) the full outline programme. This can be part of the Eventbrite listing, or the first page of your MS Form, for example. You can also find out more about your attendees. However, note that you should not ask for more information than you need (as a matter of data protection and general good practice).

The minimum information required is an email address so that you can contact attendees. You will probably also want their name, and can ask for their institution and accessibility requirements.

If the event is sensitive or controversial, you might ask participants to agree to a code of conduct (see section 11).

If you are considering holding future events, or would like to maintain contact with attendees for any other reason, then it's a good idea to ask them on the registration form if they would like to join your mailing list. (You cannot treat the booking alone as permission to do this.)

You might also want event-specific information such as attendees' position, prior knowledge of the topic, choice of parallel session (eg if numbers are limited), etc.

4.3 Registration deadline

What is the latest time for attendees to register? Consider the following:

- A late deadline is helpful because people may hear about the conference late or only become free close to the day. For online events, this does not cause issues with space, catering, etc.
- However, it must be early enough to give you time to see it and send out the attendee information before the event begins.
- Make sure that you have set booking to close at that time – leaving the form open but not responding to late registrations is frustrating for the would-be delegate and harms your reputation.

5. Technology

Hosting an online event requires you to choose which platform you will use, as well as whether to draw upon additional tools.

5.1 Meeting platforms

The most popular choices for the main platform are Teams and Zoom, although your institution may offer others. Factors such as institutional policies and subscriptions may influence your choices here. Both offer many of the same features, and raise the same considerations noted here.

- Consider security features. The most important of these is **not publishing the meeting link publicly**. Provide it to participants directly, e.g. by email. Ask participants to share the booking link, not the meeting link, with interested colleagues.
- Do you want a waiting room? This allows you to control who outside your organisation joins the meeting – but bear in mind that monitoring it is complicated by people using different screen names and so on. It can be a good idea to have a designated person looking after the waiting room.
- Do you want chat to be enabled? If so, for larger events, it is a good idea to have a designated person keeping an eye on the chat and where appropriate, sharing relevant questions and comments from it. (Attendees are also likely to use the chat for conversations with each other, and this is a valuable form of networking for online events.) Note that even if you use the Q&A function, some people will ask questions in chat anyway.
- Do you want Q&A to be enabled? It makes questions easy to spot, and may allow other participants to vote on the most interesting/useful, but doesn't prevent everyone from asking questions in the main chat. Thus, if chat is enabled, it may be

easier to keep questions there – but in larger events that does risk a question being overlooked.

- Do you want non-presenters' microphones and cameras to be enabled? This can improve question time significantly, and avoids issues where presenters join using different credentials, but does increase the risk of disruption when people fail to switch them off appropriately. (Teams allows you to mute participants but not switch off their cameras.)

5.2 Additional tools

There are all sorts of options for additional tools. These might include Miro boards, Padlets, and polling or quiz apps. Factors to bear in mind when considering whether to use them (or allow presenters to) include:

- Are they accessible (eg to screen readers, people without smartphones)?
- Are they simple and intuitive to use?
- Are they necessary? In other words, do they add something to the presentation or are they simply a distraction?
- Is the functionality already available within Teams/Zoom?
- Are they open to people outside your institution?
- They need to be set up in advance, and links ready to share at the appropriate moment.
- Are you planning to leave them open to attendees after the event? Note that (a) in practice, they are often unused once the conference is over; and (b) you need to close them at a set date (unless attendees are aware they are a permanent resource) and continue to monitor them for as long as they are open.

5.3 Accessibility

The following links provide further guidance on accessibility:

[Top tips for hosting accessible and inclusive online events \(GOV.UK blog\)](#)

[Hosting accessible and inclusive online meetings and events \(IncludeAbility\)](#)

[How to use accessibility features on video conference apps \(RNID\)](#)

[Accessibility tips for inclusive Microsoft Teams meetings and live events \(Microsoft\)](#)

[Make your PowerPoint presentations accessible to people with disabilities \(Microsoft\)](#)

[Organising an inclusive conference \(Royal Geographical Society\)](#)

[Facilitation, Communication & Access \(Intersectional Neurodiversity and Disability Reading Groups\)](#)

6. Information to speakers

General principle: make information as clear and comprehensive as possible. This makes your event more accessible to participants, as well as reducing the number of queries and problems you will have to resolve.

- Programme: send a draft programme to presenters before sharing publicly so that timing issues can be resolved in advance. Ensure that presenters are also sent the final programme, with links to the online room(s), and the book of abstracts (see section 7) if applicable.
- Registration: invite presenters to register on your online booking platform, to ensure that they receive all updates.
- Venue: confirm to speakers that the event is online.
- Length of presentation: remind presenters that they are limited to, eg, 15 minutes.
- Camera: presenters should be asked in advance to appear on camera during their presentation. This is important for participants who use lip-reading, for example. Being aware of this in advance allows presenters to ensure that they are in a suitable location and have their camera enabled.
- Background: it may be a good idea to gently request speakers not to use moving/animated backgrounds. (They can be distracting or worse for attendees.) If some speakers might not be familiar with the event platform then some simple instructions on blurring or changing the background may be helpful.
- PowerPoint arrangements: it is usually easiest if presenters are able to share and operate their slideshow themselves. However, issues may arise on the day, so consider encouraging them to email slides in advance. You can then share them if the presenter is unable to. Remind speakers that attendees will be joining from a variety of devices: slides should not have too much information so that they remain legible on small screens.

- Presenting: speakers should be encouraged to use a headset (for better sound quality) and accessible PowerPoint presentations.
- Recording: ask in advance for permission to record the presentation if you are hoping to do so. Presentations should not be recorded without their permission; asking them on the day can make it awkward to refuse.
- Emergency contact: ensure that presenters have a way of contacting organisers if there are any problems on the day (for example, an email address which will be monitored during the event).

Would a tech rehearsal be helpful? If you are using a standard platform then there should be no need to make it compulsory. However, presenters unfamiliar with the platform or with online presenting may appreciate the opportunity to practice with you in advance.

7. Information to other participants

General principle: make information as clear and comprehensive as possible. This makes your event more accessible to participants, as well as reducing the number of queries and problems you will have to resolve.

Send an email as soon as possible after registration, and again a few days before the event, that includes the following:

- The full programme, with links to the online room(s).
- If applicable, the book of abstracts – as either a link or attachment. Ensure that it is in an accessible format. This should include brief biographies of the speakers if possible.
- A reminder of the code of conduct, if appropriate (see section 11)
- A contact email that will be monitored on the day, in case of issues.

8. Chairs

Before their session, the chair should be given an annotated programme which shows whether speakers have consented to being recorded and notes any special arrangements. They should also be given access to any slides sent in advance for their sessions.

They should also be given guidance on running the session. In drafting that guidance, you may find the following advice on timing, mics and cameras, and the Q&A helpful.

It is a good idea for the chair to make contact with panellists in advance of the session, to introduce themselves, see if the speaker has any requirements, and obtain any information (eg preferred name, pronunciation, pronouns) for introductions. This can be done by email before the conference and/or during the break before the session begins.

8.1 Timing

It is important that the event runs to time, and it is the chair's responsibility to ensure that it does:

- In online events, people may join for specific sessions. It is unhelpful for them and disruptive for others if they are arriving mid-session.
- Overrunning and then shortening breaks may not allow people adequate time to go to the toilet and get a drink, especially if they are disabled.
- Deviating from the timetable can cause stress to some participants, particularly some neurodivergent people.

Time warnings are therefore important - and also remove the burden of timekeeping from the speaker – but they are more difficult to give effectively in an online event. Verbally interrupting the speaker can be distracting; a chat message may go unread. We have found that having the chair switch their camera off during the presentation but switch it back on two minutes before the end is generally effective.

- Teams has an online timer which can be very useful – or very distracting – for speakers. If you plan to offer this, it is a good idea to check the speaker's preference first, and to bear in mind that the timer will be visible to all attendees.

8.2 Mics and cameras

One reason a camera-on time warning works is because we ask everyone except the presenter to have their camera off and mic muted. That is also important to avoid unnecessary distractions, supporting everyone's accessibility and comfort. The audience should be reminded of this at the start of every session: remember that not everyone will have been at the previous session.

If somebody does not mute themselves, then in Teams, the hosts can mute them individually. Their 'square' will be highlighted, making them easier to spot!

8.3 Introductions

Introduce the session briefly:

- remind participants to switch off mics and cameras
- tell them that the Q&A will be at the end
- advise if (part of) the session will be recorded – and that the Q&A will not be recorded, and participants other than the speaker will not appear on the recording.

Decide a consistent approach to speaker introductions in advance. Shorter is often better: simply give the person's name and perhaps their paper topic or title. Biographical details are generally only needed for keynote speakers – for other speakers, participants can consult the book of abstracts if available. (If biographies are being given, it is a good idea to agree them with the presenters in advance.)

Our preference is to use the speaker's name but not title. That creates a more inclusive environment where speakers are at a variety of career stages or are non-academics, since it

avoids the hierarchy of 'Mx/Dr/Professor'. If titles are used, this should be consistent for all speakers.

If the chair is unsure of how to pronounce a speaker's name, or of their pronouns, they should check in advance if possible (eg by asking the speaker during the break before the session begins).

8.4 Q&A

After the presentations, the chair should manage the question-and-answer part of the session. The following tips are helpful:

- If questions are asked in the chat or Q&A, the chair should read them out.
- The 'raise hands' function should be used for verbal questions.
- If there are both verbal and chat questions, alternate between the two modes so that one is not disadvantaged.
- Limit follow-up questions if there are others waiting.
- The chair should prepare at least one question for each speaker. That can help to get the questions started if people are hesitant to begin, and ensures that no speaker is left ignored.
- If there are a lot of participants then having a second person to moderate the chat and read out questions is helpful.

It can in some ways be more difficult to manage the Q&A online. For example, Teams numbers the order in which hands are raised. However, that does not oblige you to take questions in that order if there is a reason not to, such as ensuring diversity of questioners.

9. On the day

The chairs and presenters should already be prepared for what will happen on the day: see sections 6 and 8. There is more to be done, though!

9.1 Organisers

On the day, the organisers will need to ensure the following:

- Someone opens the meeting room early.
- Slides have been prepared for display before the start and during the breaks. These should at a minimum show the event name and date. Ideally, they will include the time when the next session begins.
- Someone is monitoring the emergency email address.
- The chair and presenters for the next session are present.
- Ensure it is obvious attendees are in the right place! A welcome slide before the event starts and during breaks helps; it is also useful to greet attendees as they arrive so that they know other people are present and can check their own audio is working.
- Someone competent to provide basic technical troubleshooting is present, and has the contact details of tech support. It is helpful if someone also has access to the event mailing list in case an issue can only be resolved by moving the meeting to a new room/link.

9.2 Subtitles/transcription

Teams offers live captions. They are generated by Automatic Speech Recognition – so do be aware that they are not entirely accurate, and work better with some accents than others. Unlike the meeting transcription option, caption data is not stored.

9.3 Technical issues

These are almost inevitable, but not predictable. It is therefore a good idea to ensure that someone familiar with the technology is present or on standby. The earlier guidance will help you address some of the issues, eg:

- If the presenter cannot share their slides, but has emailed them, the chair can share the presentation for them.
- If they cannot get into the room, they should have an emergency email or similar to contact you.

Some other basic tips include:

- Inexplicable problems with audio/video can often be resolved by leaving and re-entering the room!
- For Windows users, a PowerPoint presentation can be launched by pressing f5.

9.4 Feedback

Getting feedback from attendees is valuable, and can be done easily in an online form. In terms of design, shorter is better. Ask for specific information you really want to know, plus one or two general questions. We have found the following effective (and more interesting and useful than rating things 1-5):

- What did you enjoy most about the day?
- Is there anything that could be improved?

Think carefully about whether you need demographic information. If you do, it is best to ask open questions ('How would you describe...?') rather than provide checkboxes.

It is a good idea to share a link to the conference feedback form in the chat towards the end of the event as well as in a follow-up email (see section 10).

10. After the event

First, relax! Then it's time to follow up with the final tasks.

10.1 Emails

Send emails to presenters and attendees – don't forget to include a link to the feedback form (see section 9.4). Share any papers/slides that are to be circulated (or the link where they are hosted). You might also want to offer another opportunity to join the mailing list.

There should also be a later email when recordings are available (if relevant).

10.2 Recordings

Recordings need to be downloaded and saved in an appropriate place – bear in mind security and data protection. They will then need to be edited before sharing.

- Simple, free or low-cost software is available. ClipChamp is Microsoft's software.
- Make sure participants other than the presenter are not visible – you can, for example, put a filled shape over the attendance/video thumbnail panes.
- Cut out parts that shouldn't be there, eg people testing that their slides are shared.
- Check that there are no copyright issues with slide images. If there are, again these can be blanked out.
- Consider adding a title page with the event details. You can also add a title for the individual presentation and a closing slide.

10.3 Feedback

Don't forget to analyse the feedback! Note any changes for your next event.

10.4 Mailing list

Update your mailing list with new sign-ups. Make sure that you are storing it securely in accordance with data protection requirements.

11. Sensitive and controversial topics

The previous sections of the guide apply to events involving discussion of sensitive or controversial topics, but there are also other considerations. This guide does not attempt to give detailed specialist advice, but to highlight some considerations.

11.1 Code of conduct

It is a good idea to share a code of conduct with participants. This can be part of the booking form, with participants required to agree to it as part of their booking. It can be shared in the event introduction, and in the chat.

Your group, centre or institution may already have a suitable code of conduct. If not, an online search for 'university event code of conduct' will return a number of examples from other institutions which you may be able to adapt.

11.2 Event security

Review the decisions you have made about meeting settings (see section 5) and consider whether these need to be adjusted to ensure that the event runs smoothly without unwelcome interruptions. The advice not to share the meeting link other than in emails to participants is particularly important for events with sensitive or controversial content.

You might want to communicate how you have considered event safety in advance e.g., explain that a list of attendees will be collected in advance, have an opportunity for speakers to check over the attendee list, explain the code of conduct at the start/make it available throughout the event. If you are using tools such as the chat and Q&A, it is important to ensure that these are being monitored throughout the event and closed as soon as it ends.

You should also think about a protocol for if things go wrong.

11.3 Support

The nature of an online event is that many participants will be sat alone. They will therefore not have access to support from other participants in the ways they might at an in-person event. Consider how your participants can be supported. For example:

- Include enough information for them to identify potentially sensitive content in advance. That might be done, for example, for the event as a whole, or through clear session descriptions or specific content notes. If a specific paper looks likely to be particularly sensitive then the presenter can be encouraged to highlight this. For example, even where participants are aware of the sensitivity of a topic, some materials such as distressing images can have additional impact.
- Provide information about sources of support (eg helplines, support organisations) at appropriate points during the day – such as on a slide or in the chat – and in the follow-up email.
- Safeguarding break times is essential. Also ensure that participants are aware they can leave a session early if necessary. Ensure that someone stays in the room during breaks in case somebody wants to chat.

Further reading:

Your institution's policies and procedures

[Trans safety & online events \(Tig Slater\)](#) contains valuable guidance applicable to all potentially controversial events

12. Timeline

