

*Google Open Source Program Office*

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# Open Source Virtual Events Guide

*Make the most of community time working remotely*

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# Summary

This document is designed for anyone that has some experience hosting events. It is meant to point to existing resources and serve as a guide on how to host virtual events, with a focus on 4 of the most popular event types in the Open Source world: developer summits, community calls or panels, workshops, and working group meetings.

# 1. Planning

## Set Objectives:

*Is a digital event the right outlet for you?*

Events of any kind take time to design, produce, and follow up on, which is why they require a dedicated event manager. If no one in your team can lead an event, consider whether you can achieve your goals using a different outlet. In the table below, we compare events to other ways of engaging your audience, based on most common engagement goals.

	Virtual Conference / Summit	Video On Demand	Social Content	Blog	Written Doc	Virtual Workshop	Video Call
Planning & Lead-Time	3 months	1 month	1 week			2 weeks	1 day
Announcements	✓	✓	✓	✓			
Demo feature/tool	✓	✓					✓
Content Distribution	✓	✓	✓	✓			
Hands on practice						✓	
Process Distribution					✓		

The main difference between events and other outlets is synchronicity: events bring all interested parties together simultaneously, while codelabs, recorded talks, written documentation, and blogs can be consumed asynchronously. Losing that shared momentum will require new strategies to keep your audience engaged on your specific timeline, for example, offering swag to participants who complete your training by a certain date, etc.

## Leverage the benefits of digital events

Digital events are an opportunity to engage audiences that may not be able to attend in-person events because of geographical distance, visa regulations, funds, and other limitations. What countries or regions have you yet to reach with your projects? Where are those development opportunities? Digital events are an opportunity to:

- **Bring more diversity to your community of users and contributors.** A more diverse community will build a more accessible product. Look at the project you are supporting and ask yourself: who isn't here? Who should be at this event, but hasn't been able to attend? Think about diversity through different variables: age, geography, language, gender, and accessibility, are some of the most common focuses in a diversity strategy. Why do you need a diversity and inclusion strategy? Even long-standing projects with established communities can suffer from slow project adoption, increased number of unresolved bugs, burnout in project maintenance, and other symptoms of a stagnant and slow growing community. Long-standing committers often focus their efforts in the same areas, and as the project expands, could benefit from new committers to support expanding workflows. Projects that are inclusive and equitable encourage new contributions that lead to the project's healthy growth.
- **Activate new markets.** Where could your project be successful? Think about potential regions for expansion and take your project there with a digital event.
- **Streamline content production for your project.** While digital events force you to narrow down your content, this exercise is also an opportunity to create more focused webinars, talks and presentations. If you had to choose 2-3 topics a month, what would you focus on? This content can be prepared to present at a digital event, and once recorded, it can be distributed across multiple project platforms.
- **Cost & resource efficiency.** We can save costs compared to in-person events, that will require venue fee, speaker & staff travel fee (flight & hotel), production fee, etc

## Accessibility

Consider the following as a speaker:

- Avoid strictly visual, non-contextual language like "over here in this area," not all viewers can see slides or videos.
- In meetings, think about multi-sensory cues for turn-taking
- Use real time closed captions if available on your platform ([Google Meet Accessibility](#), [YouTube Live Captions](#))

## Write an Event Brief:

### [Event Brief Template](#)

- Copy the template doc and customize it for your own event

### 1. Objective

- Why are you doing this?
- Why this particular event format?
- What is a big goal you'd like to achieve?

### 2. Audience

- Who is your target audience?
- Why do you want to reach them?
- How do you reach them?

### 3. Logistics

- When
  - Date & Time
  - Length
- Where
  - Platform tool you use?
- What
  - Theme
  - Content
  - Agenda
- How
  - Promotion
  - Registration
  - Communication plan
  - Follow-up (Survey, Blog Post, etc)

### 4. Measurement

- What is your successful matrix and how do you measure it?
  - Event/content satisfaction
  - Reach xx people
  - Increase an engagement rate by xx%
  - Increase adoption/downloads
  - Generate leads
  - Generate xx Cloud revenue
  - Post-event content engagement

## Create Master Tracker

### [Event Master Tracker Template](#)

- Copy the template doc and customize it for your own event

## Work with Planning Team

- **Identify** who should be in a planning team
- **Set up** a Weekly Planning Meeting
- **Clarify** role & responsibility
- **Assign** action items to appropriate POC
- **Check-in** every week

## Create Run of Show

### [Event Run of Show Template](#)

- Copy the template doc and customize it for your own event

## Event Types

This table focuses only on open source most common event types.


Type	Length	Description	# Participants	Communication flow	Tools	More guidance
<b>Virtual Conference/ Summit</b>	0.5 - 1 Day	<ul style="list-style-type: none"> <li>- Several presentations</li> <li>- Hands-on practice</li> <li>- Social time</li> </ul>	250+	<ul style="list-style-type: none"> <li>Bi-directional during sessions</li> <li>Multi-directional</li> </ul>	<ul style="list-style-type: none"> <li>Livestream</li> <li>Chat Room</li> <li>Networking Room</li> </ul>	<ul style="list-style-type: none"> <li>- Create rules of engagement and code of conduct</li> <li>- Temporary chat rooms</li> </ul>

				during social time		- Built-in social time <a href="#">More info</a>
<b>Virtual Call</b>	1-2 hour	- 2-3 people present for 30 minutes on a new technical feature for a project - May include demos. - Social time	30 - 100	Bi-directional	Teleconference	- Build in social time as breakout rooms <a href="#">More info</a>
<b>Virtual Workshop</b>	1-2 hour	- 1 instructor shows the audience how to perform a task, run a process, or use a tool -A learning opportunity	30 - 100	Bi-directional  Multi-directional for support requests	Teleconference Share terminal Chat Room	- Create a structure of instructor and mentors - Send instructions to participants ahead of time - Create a special chat room for support requests  <a href="#">More info</a>
<b>Virtual Working Group Meeting</b>	0.5-1hour	Recurring meeting where a group comes together to work on a specific topic for a project.	10 - 20	Bi-directional	Teleconference	- Make sure all the links on Docs are ready and working. - Have clear prompts ahead of time, written down in the Docs with instructions on how to engage - Consider using silent Docing when asking for input <a href="#">More info</a>

# 2. Tools



We are focusing on three specific Google tools that can help organize events here. For other alternative tools, please refer to the [Resources Section](#).

## Google Hangouts

<a href="#">Google Hangouts</a> 	<b>Summary</b>	You can connect with family, friends or colleagues via face-to-face video calls for free. Video calls can include up to 25 people.
	<b>Function</b>	<ul style="list-style-type: none"> <li>• Video Call</li> <li>• <a href="#">Compare Meet with classic Hangouts</a></li> </ul>
	<b>How it works</b>	Open <a href="https://hangouts.google.com">hangouts.google.com</a> or on the sidebar in <a href="#">Gmail</a> . Select someone from the Hangouts list or search for their name or email address. You can also select multiple people to start a group video call. <a href="#">How to Start a Video Call</a>




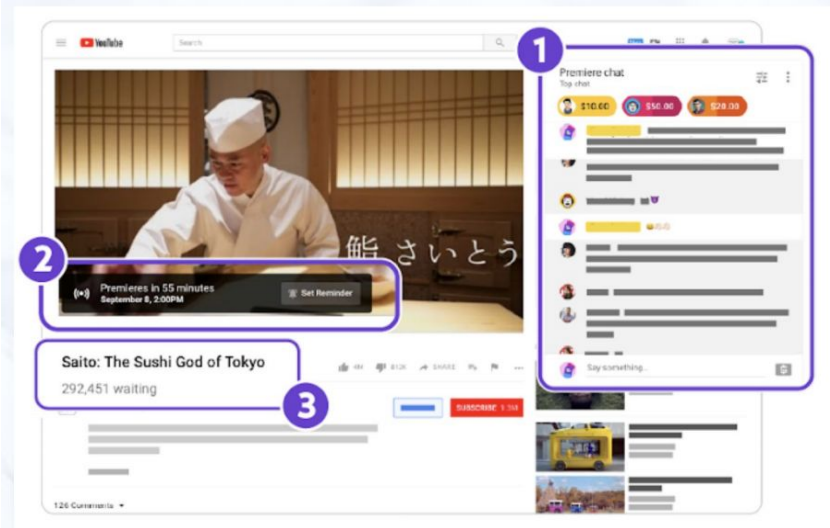
## Google Meet (G Suite)

<p><a href="#">Google Meet</a> (G Suite)</p> 	<p><b>Summary</b></p>	<p>Secure video meetings for your business. Keep your team connected with enterprise-grade video conferencing built on Google’s robust and secure global infrastructure. Meet is included with G Suite and G Suite for Education.</p> 
	<p><b>Pricing</b></p>	<p><b>Free:</b> As of April 29th 2020, we’re making Google Meet, our premium video conferencing product, free for everyone, with availability rolling out over the coming weeks. Meetings are limited to 60 minutes for the free product, though we won’t enforce this time limit until after <b>September 30, 2020</b>. (<a href="#">Blog post</a>)</p> <p><a href="#">Pricing Plans</a> (<a href="#">Plan Comparison</a>)</p> <ul style="list-style-type: none"> <li>- <b>Basic:</b> \$6 /user/month (up to <b>100</b> participants)</li> <li>- <b>Business:</b> \$12 (up to <b>150</b> participants)</li> <li>- <b>Enterprise:</b> \$25 (up to <b>250</b> participants or up to <b>100,000</b> live streaming viewers)</li> </ul> <p><i>Note : Through <b>September 30, 2020</b>, G Suite customers can use advanced Google Meet video conference features, such as larger meetings (up to <b>250</b> participants), live streaming (up to <b>100,000</b> viewers), and <b>recording</b>. After September 30, Google Meet functionality will revert to G Suite Basic, Business, Nonprofits, or Education based on the customer’s edition. However, recorded meetings will stay in the respective owner’s Drive. (<a href="#">Blog Post</a>)</i></p>

	<b>Hardware</b>	<a href="#">Meet hardware</a>
	<b>Layouts available</b>	Presentation, Thumbnail, <a href="#">Tiled view</a>
	<b>Function</b>	<ul style="list-style-type: none"> <li>• Multiple presenters</li> <li>• Chat</li> <li>• Ability to mute others</li> <li>• Dial in, by dialing into a US/ international phone number (Only available for <a href="#">G Suite plan</a>)</li> <li>• External participants (Only available for <a href="#">G Suite plan</a>)</li> <li>• <a href="#">Live streaming</a> (Only available for <a href="#">G Suite Enterprise plan</a>)</li> <li>• Record meetings and save them to Drive (Only available for <a href="#">G Suite Enterprise plan</a>)</li> </ul> <p><i>Note : Through <b>September 30, 2020</b>, G Suite customers can use advanced Google Meet video conference features, such as larger meetings (up to <b>250</b> participants), live streaming (up to <b>100,000</b> viewers), and <b>recording</b>. After September 30, Google Meet functionality will revert to G Suite Basic, Business, Nonprofits, or Education based on the customer's edition. However, recorded meetings will stay in the respective owner's Drive. (<a href="#">Blog Post</a>)</i></p>
	<b>How it works</b>	Simply set up a meeting and share the link. No worrying about whether teammates, clients, or customers have the right accounts or plug-ins. With a fast, lightweight interface and smart participant management, multi-person video calls are a breeze.
	<b>Security</b>	Take advantage of the same secure-by-design infrastructure, built-in protection, and global network that Google uses to secure your information and safeguard your privacy. Meet video meetings are encrypted in transit and our array of default-on anti-abuse measures keep your meetings safe. ( <a href="#">Blog Post</a> )
	<b>Country Restriction</b>	<a href="#">Source</a> G Suite is available in most countries and regions. However, Google restricts access to some of its business services in certain countries or regions, such as China, Crimea, Cuba, Iran, North Korea, Sudan, and Syria. Certain Google services might be available in these countries or regions for personal use, but not for business or education use.
	<b>Resource</b>	<ul style="list-style-type: none"> <li>• <a href="#">Google Meet training and help</a></li> <li>• <a href="#">We're rolling out 4 top-requested Google Meet features</a> (April 20, 2020)</li> </ul>



# Live Stream on YouTube

<p><a href="#">Live Stream on YouTube</a></p> 	<p><b>Summary</b></p>	<p>YouTube Live is an easy way to reach your community in real time. Whether you're streaming an event, teaching a class, or hosting a workshop, YouTube has tools that will help you manage your stream and interact with viewers in real time.</p> <p>Plan ahead for your first live stream. <a href="#">Enabling a live stream</a> for the first time may take up to 24 hours. Once enabled, your stream can instantly go live.</p> 
	<p><b>How it works</b></p>	<p>Before hosting your live event on YouTube, you'd need to have a YouTube channel up and running. If you haven't done so already, follow these <a href="#">steps</a> to create a new channel (you'll need a <a href="#">Google account</a>).</p> <p>You can live stream on YouTube via webcam, mobile, and encoder streaming. Webcam and mobile are considered great options for beginners and allow you to go live quickly. While encoder streaming is ideal for more advanced live streams.</p> <p>There are a few ways you can live stream on YouTube:</p>

		<ul style="list-style-type: none"> <li>● <b>Webcam:</b> Live streaming via webcam is an easy way to go live without the need for an encoder. Start streaming from your laptop/desktop computer using your webcam. Anyone with a YouTube channel can livestream from webcam. <a href="#">Learn more.</a></li> <li>● <b>Mobile:</b> Streaming on mobile lets you stream from the YouTube app. YouTube Live is available on Android 5.0+ and iOS 8+. To be able to live stream on mobile, your channel will need to have at least <b>1,000</b> subscribers. <a href="#">Learn more.</a></li> <li>● <b>Encoder streaming:</b> Encoders allow you to capture content, including your desktop, camera, microphone, and more, and send it to YouTube Live to be streamed to your audience. <a href="#">Learn more.</a></li> </ul>
	<p><b>Live Chat function</b></p>	<p>Live chat is enabled by default and will appear to the right of the video player when your live stream is active. After your live stream ends, viewers will see a replay of live chat when they watch the stream archive. The Live chat module only exists on the YouTube watch pages – it does not follow embedded players. Watch the <a href="#">video demo</a>.</p>
	<p><b>Guideline</b></p>	<p>All content in live streams must adhere to YouTube’s <a href="#">Community Guidelines</a> and <a href="#">Terms of Service</a>. If a user suggests that they will live stream content that violates our Community Guidelines, we may age-restrict or remove the live stream. YouTube also reserves the right to restrict a user’s ability to live stream at its discretion.</p>
	<p><b>Resource</b></p>	<ul style="list-style-type: none"> <li>● Learn more about live streaming in our <a href="#">Help Center</a>.</li> <li>● <a href="#">Playbook</a></li> </ul>

# 3. Roles & Assets

## Virtual Conference / Summits

### Roles

- **Summit Host(s).** This person is in charge of welcoming participants, introducing presenters, keeping track of time and guiding everyone through the agenda.
- **Instructor.** This person is leading any training given at the summit. There can be as many instructors as there are training sessions (usually 1 instructor per session).
- **Mentor.** This person has expert knowledge in the training topic, and is there to support participants who get stuck. They need to be able to remotely manage a computer, and get participants back on track with the curriculum. There are, usually, 4 mentors per instructor.
- **Participant.** This is the person who is there to learn from the event, socialize with others and make connections.

### Resources

- **Run of show.** This is a document that reflects the agenda for the day, with detailed notes on who is leading each section, with a timestamp associated with each portion of the event. It is used mainly by the event host and other people helping to facilitate the event (like mentors and instructors). It allows others to see where in the event's journey everyone is.
- **Rules of engagement.** Write down as much as possible how you expect people to engage during the event. Include things like asking people to have their camera on, mute when connecting to the call, and other details that can help anyone make the most of the virtual event.
- **Built-in social time.** During virtual events, social time has to be scheduled and intentional, otherwise participants won't have an opportunity to connect with others throughout the event. Make time in the agenda for people to connect, and prepare prompts for them to talk. Split people in groups of 2-4, and create separate video-conference rooms for each group. Social time should also be limited to a specific slot.
- **Know-before-you-go resources.** Send participants all the software they need to have to take part in the event, as well as any guidance or material on how to best prepare.
- **Content.** Ask your instructors to submit the content of their training in advance, so you can distribute it to everyone as soon as the session is over.

- **Chat rooms.** Create temporary chat rooms for the event, that you can delete after 30 days. Use the chat rooms to communicate with participants throughout the event, and have a special room to request support.
- **Terminal sharing software.** [Tmate.io](https://tmate.io) allows others to join your terminal session and do pair programming, as well as enabling remote access to someone else's terminal. This software has limitations; it's only meant for CLI environments. For those who develop across IDEs, browser tools, and CLI: <https://www.teamviewer.com/en-us/>. For IDE only: <https://www.sitepoint.com/collaborative-coding-tools-for-remote-pair-programming/>

### Variation: Large scale conference with unidirectional communication flow.

- **Definition:** An event with multiple presentations, where you only need to present to participants and not receive feedback.
- **Number of participants:** 1,000 <
- **Recommended solution:** YouTube streaming or Google Meet Livestream
- **Considerations:** recording can be available later on your YouTube channel for consultation and Google Meet Live Stream for G Suite customers.

## Call / Panel

### Roles

- **Host.** This person is in charge of welcoming participants, introducing presenters, keeping track of time and guiding everyone through the agenda.
- **Presenters.** This is the person that will present a new feature, a use case, or demo of a technical solution for the meeting in place. It is recommended to have 2-3 presenters per call, with a maximum of 30 minutes per presentation. Only 1 presenter would constitute a webinar, more than 4 presenters requires more than two hours to meet.
- **Participant.** This is the person who is there to learn from the event, socialize with others and make connections.

### Resources

- **Content.** Ask your instructors to submit the content of their training in advance, so you can distribute it to everyone as soon as the session is over.
- **Chat rooms.** Create temporary chat rooms for the event, that you can delete after 30 days. Use the chat rooms to communicate with participants throughout the event, and have a special room to request support.
- **Built-in social time.** During virtual events, social time has to be scheduled and intentional, otherwise participants won't have an opportunity to connect with others throughout the event. Make time in the agenda for people to connect, and prepare prompts for them to talk. Split people in groups of 2-4, and create separate video-conference rooms for each group. Social time should also be limited to a specific slot.

## Workshop

### Roles

- **Workshop Host.** This person is in charge of welcoming participants, introducing presenters, keeping track of time and guiding everyone through the agenda.
- **Instructor.** This person is leading the training.
- **Mentor.** This person has expert knowledge in the training topic, and is there to support participants who get stuck. They need to be able to remotely manage a computer, and get participants back on track with the curriculum. There are, usually, 4 mentors per instructor.
- **Participant.** This is the person who is there to learn from the event, socialize with others and make connections.

### Resources

- **Run of show.** This is a document that reflects the agenda for the day, with detailed notes on who is leading each section, with a timestamp associated with each portion of the event. It is used mainly by the event host and other people helping to facilitate the event (like mentors and instructors). It allows others to see where in the event's journey everyone is. Check out the [Glossary section](#) for examples and guidance on how to create a ROS.
- **Rules of engagement.** Write down as much as possible how you expect people to engage during the event. Include things like asking people to have their camera on, mute when connecting to the call, and other details that can help anyone make the most of the virtual event.
  - **Built-in social time.** During virtual events, social time has to be scheduled and intentional, otherwise participants won't have an opportunity to connect with others throughout the event. Make time in the agenda for people to connect, and prepare prompts for them to talk. Split people in groups of 2-4, and create separate video-conference rooms for each group. Social time should also be limited to a specific slot.
- **Know-before-you-go resources.** Send participants all the software they need to have to take part in the event, as well as any guidance or material on how to best prepare.
- **Content.** Ask your instructors to submit the content of their training in advance, so you can distribute it to everyone as soon as the session is over.
- **Chat rooms.** Create temporary chat rooms for the event, that you can delete after 30 days. Use the chat rooms to communicate with participants throughout the event, and have a special room to request support.
- **Terminal sharing software.** [Tmate.io](https://www.teamviewer.com/en-us/) allows others to join your terminal session and do pair programming, as well as enabling remote access to someone else's terminal. This software has limitations; it's only meant for CLI environments. For those who develop across IDEs, browser tools, and CLI: <https://www.sitepoint.com/collaborative-coding-tools-for-remote-pair-programming/>



## Working Group Meeting

### Roles

- **Meeting facilitator.** This person is in charge of leading the meeting's agenda, facilitating discussions and keeping track of time.
- **Note taker.** This person is in charge of taking notes of most important highlights during the conversation, documenting resolutions, calls to action, and follow up steps for everyone involved.
- **Participant.** This person is joining the meeting because they have a personal stake in the matter, they either need to give input in the issues discussed, or need to present on a topic. They are here to engage in conversation.

### Resources

- **Meeting agenda.** Have a clear agenda that you send to meeting participants ahead of time, which outlines all the topics that need to be discussed with a brief description and any links if necessary. If you need input from participants on specific aspects, consider writing down specific prompts for people to engage during the meeting.
- **Silent gDoc'ing.** This is a practice by which the facilitator prepares (in advance of the meeting) prompts for discussion, or questions, to the group. Create clear statements and guide participants through the agenda, giving 3-5 minutes to fill out each prompt. Each question or discussion prompt should be followed by a bulleted list, and participants should take one bullet each. Participants should precede their comments with their initials, and are allowed to +1 or add comments to other participants' input. [Example](#).

# 4. Resources

## Google Resource

The following is a list of guides that do a deep dive on specific tools, with a particular focus: guides for open source communities, how to keep events safe, etc.

- [Taking events online](#). Covers strategic approach to digital events, design + setup, Interactivity and engagement, legal + FAQs, and case studies. Focuses on productions on the higher end, with stage set and style.
- [Online activities: Guidance for communities](#). This slide deck goes over how to set goals for your community, what are online events, and does a deep dive in recommended solutions.
- [YouTube playbook for digital events](#). Has information on how to set up a YouTube channel, how to brand it, how to create live events and stream to your audience, etc.

## External Resource

- [Virtual Conferences | A Guide to Best Practices | What Conferences Can Do to Replace Face-to-Face Meetings](#). A practical guide to the new world of virtual scientific conferences, assembled and curated by members of the Association for Computing Machinery's Presidential Task Force on What Conferences Can Do to Replace Face-to-Face Meetings.
- [Tools for Virtual Conference](#). Published by Association for Computing Machinery's Presidential Task Force
- [Comparison of web conferencing software](#). A comparative table on English Wikipedia that looks at different video conference software in virtue of different popular features.
- [Virtual event suggestions for open source communities](#) by The Linux Foundation. Guidance for large events including robust exhibit hall, concurrent session, attendee networking with a large budget.