Transforming the way we meet: Planning a virtual library conference

Jennifer Deal  
*Advocate Aurora Health Care*, jennifer.deal@aurora.org

Brenda Fay  
*Advocate Aurora Health*, brenda.fay@aurora.org

Elissa Kinzelman-Vesely

Michele Matucheski  
*Ascension Health Care*

Carrie Papa-Schold  
*George Williams College of Aurora University*

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Transforming the Way We Meet:
Planning a Virtual Library Conference

Wisconsin Health Science Library Association (WHSLA)

Jennifer Deal, MA, MLIS: Advocate Aurora Health Care (jennifer.deal@aurora.org)

Brenda Fay, MLIS: Advocate Aurora Health Care (brenda.fay@aurora.org)

Elissa Kinzelman-Vesely, MA, MLIS

Michele Matucheski, MLIS, AHIP: Ascension Health Care (michele.matucheski@ascension.org)

Carrie Papa-Schold, MLIS: George Williams College of Aurora University (cpapa-schold@aurora.edu)

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Introduction

The Wisconsin Health Science Library Association (WHSLA) is a state-level professional organization consisting of approximately 40 individual members. WHSLA’s primary purpose is to promote the development of health science libraries and librarians in the state of Wisconsin. The organization provides a forum in which to exchange ideas and a community in which health sciences librarians support each other and collaborate to solve problems. WHSLA also encourages life-long learning for librarians in the health sciences and sponsors educational offerings and acts as a liaison to other health sciences librarianship organizations. WHSLA holds a biennial conference to support that mission and larger profession goals of “learning about new trends and issues, best practices, current literature, networking, and, most importantly, ingesting and developing new ideas” among its membership.

Planning for the biennial autumn 2017 conference began in early March 2017. The planning committee consisted of 5 volunteers from the WHSLA membership. The first decision made by the planning committee was to hold the 2017 WHSLA conference virtual rather than in-person. The last WHSLA conference, held in 2015 in Oshkosh, WI, cost just over $2,500. Attendance at the in-person conference was 31, including 2 presenters. We identified several reasons for falling attendance rates. Health sciences librarian positions in Wisconsin have diminished gradually over recent years; this is reflected in dwindling WHSLA memberships. It is also important to note that institutional budgets for conference fees, travel, lodging, food, and other expenses for professional development have decreased. Recognizing these trends in the health sciences librarianship field as well as the geographic and time barriers faced by librarians, the 2016 WHSLA president instituted a new virtual information sharing venue called WHSLA Wisdom Chats. Held 3-4 times a year, WHSLA Wisdom Chats brought Wisconsin health sciences librarians together via teleconference and screen sharing technology to discuss programs and projects such as narrative medicine, ORCid, data skills, and more. It was a method by which all WHSLA members, regardless of location, could be involved in the
organization on a regular basis. WHSLA Wisdom Chats served as the model on which the 2017 WHSLA virtual conference was based.

**Literature Review**

The conference planners found themselves in nearly uncharted territory. Much has been written about conference planning for librarians, but little has been published on planning a virtual conference. In a review of the literature, only 2 posters were identified that describe planning an virtual meeting.\(^3\)\(^4\) The Midcontinental Chapter of the Medical Library Association, MCMLA, held their annual meeting virtual in 2015. Brown and Bramble\(^3\) noted that the decision to hold the conference virtual was made because of “fluctuating and unpredictable attendance” as well as “rising registration costs.” The MCMLA was able to eliminate the need for planning hospitality, local arrangements, or catering, thereby saving time and money.\(^3\) At least one WHSLA conference planner also attended an annual virtual conference called the Wild Wisconsin Winter Web Conference\(^5\), so while no one on the planning committee had planned a virtual conference before, some had at least experienced one.

In addition to the challenge of planning a virtual conference, some on the planning committee had never previously planned a librarian conference, so the challenge was twofold. While nearly all authors agree that planning a conference of any kind can appear overwhelming, Werner and Kenefick\(^6\) correctly assert that “[t]here are numerous steps involved in conference planning that are not immediately apparent when first volunteering or being elected to organize an event.” Werner and Kenefick\(^6\) and Hanus and associates\(^7\) lay out roadmaps for conference planning including timelines for planning, while Shamel\(^8,9\) and Kuhr and Jensen\(^10\) provide planning checklists. Since the 2017 WHSLA conference planners are librarians first and conference planners second, they found that they had to balance their conference planning responsibilities with their daily work responsibilities. Emails, phone calls, and virtual meetings were essential in the planning process.\(^11\)
Conference Planning Committee

The first order of business for planning the 2017 WHSLA virtual conference was to recruit WHSLA members as volunteers for the planning committee. The ability to work as a team was essential and energetic volunteers were a must. Five WHSLA members representing three different institutions comprised the web conference planning committee. Each committee member brought a variety of strengths to the planning process. The WHSLA president, key planner for the committee, planned to take a leave of absence in fall of 2017, thereby complicating the planning process. The planning committee worked together to choose a cohesive theme, craft a thoughtful schedule, manage finances, select suitable technology, brainstorm appropriate session contents, streamline registration, publicize the conference, execute the plan, and then evaluate the conference’s success.

Conference Planning Document

After the first few meetings, the committee realized the number of tasks, responsibilities, and documents for the virtual conference were increasing. The many facets of planning the virtual conference were becoming difficult to track and manage. An organizational tool and checklist were needed to manage the program planning and provide a valuable resource for the next biennial meeting committee.

The planning document was created in Microsoft Excel. Individual worksheets stored the project plan and project documents. The advantage of Microsoft Excel is the ability to create multiple worksheets within one workbook. Excel offers filters and sorting features that provided an ideal platform for project management; planners were better able to locate uncompleted tasks and update or identify the status of various tasks. Worksheets in the workbook were used to capture program documents such as the budget, logos, registration form, program agenda, notes, etc.
The planning tool became invaluable when several committee members had to step down from their committee work. The committee was able to identify tasks assigned to those members and reassign to other committee members.

**Speakers and Program**

A successful conference hinges on an established speaker in the field. Fortunately, speaker options increase with a virtual conference. The speaker is not required to physically travel to the conference site, thereby eliminating conference costs associated with travel reimbursement, and diminishing scheduling conflicts for the speaker. Savings were realized, thus enabling planners to provide a generous honorarium for the speaker's services and expertise. Additionally, bringing in a nationally recognized speaker allowed WHSLA the opportunity to revitalize its dwindling membership by inducing lapsed members to rejoin the organization to attend the conference at membership rates.

The Medical Library Association (MLA) listing of Certified Speakers and the MLA Education listings provided ideas for possible speakers for the WHSLA virtual conference. MLA’s Certified Speakers can offer continuing education credits for established programs. For others, it may be possible to apply for MLA CEs. Even if the conference's hosting organization is a small local organization, such as WHSLA, aim high. A virtual conference enables planners to secure high quality, prominent speakers for keynote addresses. Well known speakers can draw attendees from outside the organization.

After considering the possible speakers, the committee decided to ask Michelle Kraft, a well-known and highly respected speaker, writer, and blogger to present her program “The Evolving Librarian” at the WHSLA virtual conference. Fortunately for WHSLA, Michelle Kraft accepted the invitation to speak at the virtual 2017 conference. When the hosting organization secures a speaker for the conference, work with that speaker to develop a contract that solidifies the terms of engagement. The speaker may already have a standard contract to quantify the date, times, fees, connection modes, and other expectations. Since “The Evolving
“Librarian” was an established program with MLA, those attending the session qualified to receive CEs.

Choosing a Theme

The committee held a brainstorming session to trigger ideas for a conference theme. Terms such as evolution, transforming, adaptation, pivoting and agility were proposed during brainstorming. As the virtual conference platform was a first for WHSLA, the concept of *transformation* was identified and adopted as the main theme. Transformation also complemented the keynote speaker’s topic of the “Evolving Librarian.” Using basic image and text editing in Microsoft Word and Photoshop Elements, a committee member created a logo for the program.

Format and schedule

Modeled after a popular, free virtual conference known as the Wild Wisconsin Winter Web Conference, the conference was scheduled in several time blocks and a separate email and calendar invitation was sent for each session. Benefits of this model include shorter sessions to record, upload, and watch. Additionally, this allowed participants to select which sessions to attend. Several librarians expressed pleasure that each session would be separate. This allowed them to attend conference sessions relevant to them. Many attendees found this
model more convenient than scheduling an entire day to attend the conference. The conference schedule was as follows:

<table>
<thead>
<tr>
<th>Session</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome and Overview</td>
<td>30 minutes</td>
</tr>
<tr>
<td>Keynote part 1</td>
<td>75 minutes</td>
</tr>
<tr>
<td>Break</td>
<td>15 minutes</td>
</tr>
<tr>
<td>Keynote, part 2</td>
<td>75 minutes</td>
</tr>
<tr>
<td>Lunch Break</td>
<td>60 minutes</td>
</tr>
<tr>
<td>Lightning Talks</td>
<td>75 minutes</td>
</tr>
<tr>
<td>NNLM GMR update</td>
<td>40 minutes</td>
</tr>
<tr>
<td>Conference wrap-up</td>
<td>5 minutes</td>
</tr>
</tbody>
</table>

Traditional, onsite conferences offer attendees the opportunity to interact and network with others in the profession. The challenge to the virtual conference planners was to incorporate interpersonal interactions into the virtual platform. A Member Update section at the beginning of the conference was offered where attendees could briefly introduce themselves and talk about current projects. This practice was established in WHSLA Wisdom Chats and helps to build our professional community. Conference planners anticipated the use of the Chat function of the web-conferencing software for additional member interaction throughout the day.

Lightning Rounds, popular at live meetings, were integrated into the virtual conference. This session gave our members and peers in the academic library communities a chance to share their own local knowledge, projects and experiences. The WHSLA membership is rich with wisdom, and planners wanted to draw on that experience as well, giving members an opportunity to present a project or topic in 5 to 10-minute bursts. Attendees were given the opportunity to ask questions of presenters via chat.
Web Conference Software

The priority in hosting a meeting remotely was finding a product that was easy to use and required minimal technical support on the day of the conference. Several products were considered including GoToMeeting, GoToWebinar, and Adobe Connect. Skype for Business, available for use through planners’ parent institutions, presented technical problems, thereby eliminating it from consideration.

GoToWebinar (GTW) was selected as it allowed for up to 100 attendees, a month-to-month subscription, webinar recording and download of recordings, ability to mute/unmute all attendees, have multiple presenters and organizers, and required minimal software installation or technical skills from attendees. The technical platform planner had previously attended meetings using GTW and discovered that its ease of use made it the ideal software platform for the 2017 WHSLA conference. GTW had an option to add a toll-free number for attendees, but was cost-prohibitive for a 5 to 6-hour meeting for 30-40 attendees. GTW instead provided non toll-free phone numbers to call. Attendees did not provide any negative feedback on using the non-toll-free phone number.

Publicizing the content, speakers, and schedule took place several months before the biennial meeting, but it was not until GTW was licensed the month before the meeting that email invitations were created and sent to registrants and presenters. Licensing GTW for two months allowed for testing, creating, and the sending of meeting invites before the meeting, as well as capturing content afterwards. In the month after the meeting, recordings were uploaded and posted to a password protected, free VIMEO account to allow viewing afterwards. The total cost for licensing GTW was approximately $230.

As the conference consisted of four sessions, separate meeting invitations were created for each session. This helped to decrease the length and size of recordings and allowed people to register for and attend the parts of the conference that were most meaningful to them. Most attended all four sessions, but others only attended the two-part keynote, or the afternoon lightning rounds and GMR sharing. Session moderators reminded attendees to check their email and log back in for the next session using that meeting invitation. One or two attendees
emailed that they needed the links resent to them. Others were unable to get back in to sessions, but were able to join again after closing and relaunching their browser. Before the conference, presenters practiced, ensuring they were able to go into GTW and identify any technical issues beforehand. Most presenters sent their presentations to us before the conference, so we were able to share the files from one, centralized computer.

To maximize interpersonal interactions, attendees were encouraged to use the chat feature in GTW. Despite close to a dozen testing sessions before the conference, a problem with the chat feature was not identified until the day of the conference. While attendees could send chats throughout the day, the chats were visible only to organizers. Conference technical support quickly copied and sent them to all attendees. This workaround led to delays and was frustrating for attendees and conference staff. One presenter asked to have a couple of polls, and those needed to be added and launched by an organizer instead of a presenter. Luckily this issue was caught beforehand, and settings were changed appropriately.

After the conference, recorded sessions and handouts were made available through the WHSLA website. All recordings were uploaded to a free Vimeo account created for this purpose, though keynote recordings were password protected at the speaker’s request to honor her intellectual property. Attendees received links and the password in a post-conference email.

Don’t let the cost of a conference product dissuade you from holding a virtual meeting. As virtual meetings become more and more common, additional free and low-cost tools, such as Zoom are available.

**Registration**

WHSLA members were able to register for free. Those without membership in WHSLA had the option of paying for a membership ($20.00) to attend or pay a registration fee ($10.00 for students/$30.00 for all others) to attend. Since most attendees were already WHSLA members they could scan and email the registration form, but others had to send a check in
with their registration. This worked for WHSLA’s small group, however, a service like PayPal may be considered in the future.

**Finances**

WHSLA provided free registration for members in good standing in the hopes that this “free” conference would encourage attendance and show the value of WHSLA membership in delivering programming to members regardless of location. Five people renewed their memberships to take advantage of the web conference and three non-members attended from out-of-state at a rate of $30 each. This first web conference was not concerned with recovering conference costs. Considering the income and expenses, the conference cost WHSLA $430. As mentioned earlier, the budget was simplified without having to contract with a conference hotel, plan for food, entertainment, or the other usual expenses associated with a live meeting.

**Publicity**

Conference information and details went out to the WHSLA and NNLM GMR listserves two to three months prior to the conference. A “save the date” email went out prior to that email. Wisconsin’s two library and information science master’s programs received conference information along with the special student rate. The WHSLA website and weekly blog displayed publicity and registration information. As a close network of librarians, word of mouth played an important role in getting the information out. It was important to advertise the flexibility of attending selected sessions and the post recording access to draw additional potential attendees.

**Division of Labor**

As the day of the conference approached, several roles emerged as necessary to make sure everything ran smoothly. Multiple people behind the scenes, each playing a different role, helped to ensure that the day was successful. Having a person serve as Tech Support was essential. This librarian had two computers displaying the conference: one as a moderator and one as an attendee. This made it easier to find and correct any technical issues. We created a Master of Ceremonies role to welcome attendees, moderate updates, introduce speakers,
communicate housekeeping items, schedule, and breaks. Session moderators were also used, especially during lightning rounds. In addition to introducing speakers, keeping sessions on track and on time, these moderators also did a significant amount of pre-work. They gathered presenters, communicated expectations, and collected PowerPoint and PDF files to show during the meeting.

Evaluation

A member of the conference planning team had access to Qualtrics survey software through their employer. A simple survey was created asking attendees general impressions of the conference and solicited more detailed feedback about session presenters and content. [See appendix 1 for post-conference survey questions].

The survey was tested using Qualtrics internal tools as well as human testers from the conference planning committee. A few small errors were corrected before the survey was sent out. Attendees received two emails asking them to take the survey. The first was sent out the day of the conference and the second a week later. Nineteen of thirty attendees responded to the email containing a link to the survey.

While feedback was generally positive and encouraged us to use this conference format again, several comments noted a lack of interactivity to the virtual conference. In the planning stages, the committee had discussed breakout rooms and other ways to increase interactivity but decided to table that during our initial experience hosting a virtual conference. Certainly, the next time WHSLA offers a virtual conference, providing more opportunities for virtual networking and interactivity will be part of the planning committee’s charge.

Conclusion

Like many professional groups, librarians are interested in attending and holding virtual conferences. With decreasing travel budgets and staff, the time was right, in the fall of 2017, for our state health science library association, WHSLA, to hold its first virtual conference. Our members were accustomed to using web conference software both as attendees and as
presenters and were open to attending a meeting in a new way. While we couldn’t be in the same room with each other, we could listen, talk, and network in a new way.

A virtual meeting is a means to an end: a tool to allow us to transform the way we meet. Next time, we may be able to use a service like PayPal to accept registration fees. Other ideas for future directions and possibilities might be to accept vendor displays / demos with their monetary support\(^3\)\(^4\), and to increase networking and interactivity during the meeting.

References


2. Werner SE, Kenefick C. If you host it, they will come: Lessons learned from organizing library conferences. *Journal of Hospital Librarianship*. 2006;6(1):111-114.


Appendix 1

2017 WHSLA Online Conference Survey

1. Please rate your overall satisfaction with the 2017 WHSLA online conference:
   a. Extremely satisfied
   b. Moderately satisfied
   c. Slightly satisfied
   d. Neither satisfied nor dissatisfied
   e. Slightly dissatisfied
   f. Moderately dissatisfied
   g. Extremely dissatisfied

2. Overall, I felt the 2017 WHSLA online conference was a good use of my time.
   a. True
   b. False

3. Why did you decide to attend this year’s WHSLA conference?
   a. Convenience
   b. Price
   c. Presenters
   d. Topics covered
   e. Other

4. What was your biggest takeaway from the conference? [free-text field]

5. What worked well? [free-text field]

6. What didn’t work well? [free-text field]

7. Keynote speaker, overall the session was:
   a. Did not attend
   b. Excellent
c. Great
d. Good
e. Average
f. Not what I expected

8. Over the keynote presentation was:
   a. Extremely useful and informative
   b. Moderately useful and informative
   c. Slightly useful and informative
   d. Not at all useful or informative

9. How knowledgeable was the keynote speaker?
   a. Extremely knowledgeable
   b. Very knowledgeable
   c. Moderately knowledgeable
   d. Slightly knowledgeable
   e. Not knowledgeable at all

10. How prepared was the keynote speaker?
    a. Extremely prepared
    b. Very prepared
    c. Moderately prepared
    d. Slightly prepared
    e. Not prepared at all

11. Lightning talks, overall the lightning talks were:
    a. Did not attend
    b. Excellent
    c. Great
    d. Good
    e. Average
    f. Not what I expected
12. Over the lightning talks presentation were:
   a. Extremely useful and informative
   b. Moderately useful and informative
   c. Slightly useful and informative
   d. Not at all useful or informative

13. Please rate the moderator’s management of time and discussion for the Lightning Talks.
   a. Excellent
   b. Great
   c. Good
   d. Average
   e. Did not meet expectations

14. Conference technology. The technologies used to host the 2017 WHSLA online conference were easy to use.
   a. True
   b. False

15. I liked the online format of the 2017 WHSLA online conference.
   a. True
   b. False

16. If you are interested in presenting at a future WHSLA conference or WHSLA Wisdom Chat, please tell us about it. [free-text field]
Appendix 2

Task List

Before the conference

- Begin planning conference - Team lead/WHSLA President and 2-3 other WHSLA members
- Validate CE
- Meetings set-up
- First meeting set up and lead
- Ideas for speaker
- Solicit proposals for lightning rounds
- Evaluate online platforms
- Contact GMR
- Identified speaker Michelle Kraft and send email requesting her CE course on the Evolving Librarian: Responding to changes in the workplace and healthcare
- Begin drafting the agenda
- Save the date email notice to WHSLA
- Identify moderators for the online conference
- Identify technology support
- Identify conference theme
- Find out about recording options through GoToMeeting
- Check with Michelle Kraft regarding the recording and availability of her presentation.
- Select online platform
- GoToMeeting logistics and agreement
- Develop registration form
- Meeting
- ongoing storage of recorded sessions
- Determine scope of invitation to online conference
- GoToMeeting chat box moderation
- GoToMeeting - Need technology support as well
- Lightning rounds update and email communication for submissions
- GMR update
- Conference budget
- Lightning rounds: Pick speakers and notify by August 15th Cap session at 6-9 speakers maximum so that presentations take up 45 minutes, leaving 15 minutes for questions and discussion at the end
- Post Conference Survey
✓ FAQ
✓ Backup for Jennifer if needed while on leave
✓ Update and post registration form to WHSLA web site
✓ Contact Lightning round speakers regarding logistics
✓ Approval from board for conference with budget
✓ Conference line for conference
✓ Recordings posted to WHSLA site
✓ set up survey tool
✓ Post FAQ to web site
✓ distribute FAQ?
✓ Draft program brochure
✓ draft project plan
✓ follow up with GMR
✓ Contract with Michelle Kraft for CEU approved by WHSLA Board, and signed by MM (in place of Jennifer Deal on leave)
✓ License Go2Meeting for October and November 2017
✓ Set up Debriefing for post conference planners
✓ Evaluate post-conference surreys
✓ Pay for Go2Meeting access
✓ Pay Michelle Kraft $300, Keynote Speaker
✓ Send invitations for Conference Evals via email
✓ Checklist / To-Do List for Conference Day
✓ Create ppt slides for 4 Sessions of the day
✓ Create WHSLA Web Conference Logos
✓ Test Go2 Meeting among Presenters (Michelle Kraft; Lightning Talks; GMR)
✓ Re-run Conference invitations to WHSLA Members, FRVALC, SWHSL, GMR-Wisconsin, etc.
✓ Have Presenters send ppt slides to Brenda Fay by Oct 30.
✓ Test Go2Meeting among Conference Planners
✓ How do we archive the planning documents, so they are available for next year's crew?

After the conference

✓ Should we write a paper about How to do an online conference?
✓ Send Thank yous to presenters
✓ Post Go2Meeting Recordings to WHSLA Vimeo page with password, allowing us to keep Michelle Kraft's content secure upon her request, but still allow attendees to view the presentation again.