



## VIRTUAL EVENT REQUIREMENTS & BEST PRACTICES

### Introduction

Events play an integral role in the Chapman experience by fostering community and participation, cultivating unique learning opportunities, and providing access to support services. This guide has been created to provide a standard framework for all Chapman University events hosted virtually.

Chapman students, recognized student organizations, staff, faculty, and administrators intending to host a public-facing virtual event should use to this guide for reference. Keep in mind that the quality and professionalism of your event impact the overall reputation of Chapman. Always aim for excellence.

#### Please Note:

- ❖ Events that are **not mission critical** should be postponed. Only events that are mission critical should be prioritized for the Fall Semester.

*All events are required to be professional and polished to represent Chapman well. If this standard of quality cannot be attained and executed, the event should not take place or be postponed.*

## Virtual Event Platforms and Event Types

Chapman's primary event hosting platforms are **Microsoft Teams** and **Zoom**, each of which have two types of presentation:

### Meeting

This event type allows for collaboration from all meeting attendees. Each guest will have the ability to be seen and heard using their own webcam and microphone. They can also participate in the discussion via the chatroll. This type of virtual event is ideal for club meetings and events with less than 20 participants.

### Live Event/Webinar

This event type only allows the event host and select panelists to collaborate. Attendees will only be able to see the presenters, not each other, and will not be able to use their webcam or microphone. A chatroll and Q&A box are available for attendees to interact with the speakers in real time. This type of virtual event is ideal for presentations, panel discussions, and events with a large expected attendance.

## Pre-Event Planning

### Defining Your Event Details

Defining the details of your virtual event provides a clear picture of the event's purpose, potential accommodations you might need, and the roles that will need to be performed. Determining these details first is key to creating a virtual event with a solid foundation. **Consider the following:**

*Is this event Mission Critical?*

Ideally, every event should aim to closely align with Chapman's mission and current priorities. It is suggested that any events not determined to be mission critical be postponed.

**Mission Critical events would fall under these categories:**

- ❖ Curriculum
- ❖ Athletics
- ❖ Core Interfaith
- ❖ Core Advancement
- ❖ Core Student Life
- ❖ Core Student Services
- ❖ Admissions
- ❖ Recruitment

*Will this event be a professional, polished, and positive representation of Chapman University?*

Chapman's virtual events are held to the same exceptional standard as in-person events. During the event planning stage, it is important to make sure that you have the ability to provide an experience that reflects this level of quality with the tools available to you. If it is determined that this standard will not be achievable with the available tools, the event should be postponed.

### **Essential Details**

- ❖ Meeting or Event Name and Description
- ❖ Occurrence (One-Time or Recurring)
- ❖ Date, Time, and Duration
- ❖ Internal (Chapman Community) or External (outside of Chapman Community) Participants
- ❖ Approximate Attendance
- ❖ Registration Requirements
- ❖ Audience Engagement (1-way, 2-way, Chat, Q&A)
- ❖ Screen Share Permissions
- ❖ Live Recording
- ❖ Additional Features (Breakout Rooms, Live Captioning, Live Streaming)

*Individuals planning an event that requires advanced reservation (free or paid) must utilize [Ticketing Services](#) for these needs. All reservations must come through our central ticketing platform and not be handled via any other method. To request ticketing services, use the [Virtual Event Submission Form](#).*

*\*Have additional questions about required event details? Contact [Event Scheduling Services](#).*

### **Choosing a Platform**

The basic license for Microsoft Teams is available to all Chapman students, faculty, and staff. Zoom Basic is also available by default; the availability for a Zoom Pro license is by request.

These licenses provide all the essential tools for hosting an online meeting or fully collaborative virtual event. Consider the features and experience that each provide for both presenters and attendees when deciding between platforms.

## Licensing Features

### **Microsoft Teams Basic**

- ❖ 250 participant capacity
- ❖ Up to 49 active speakers on screen
- ❖ No meeting duration cap
- ❖ One-on-one chat and group chat
- ❖ Screen sharing/co-annotation
- ❖ Cloud recording w/post processing captioning
- ❖ Live captioning
- ❖ File sharing
- ❖ Attendance tracking
- ❖ Virtual waiting room
- ❖ Virtual backgrounds

### **Zoom Pro**

- ❖ 300 participant capacity
- ❖ 49 active speakers on screen
- ❖ No meeting duration cap
- ❖ One-on-one chat or group chat
- ❖ Screen sharing/co-annotation
- ❖ Cloud recording w/post processing captioning
- ❖ Auto-record for pre-scheduled meetings
- ❖ File sharing
- ❖ Breakout rooms
- ❖ Virtual waiting room
- ❖ Virtual backgrounds

If you are planning a live-event, townhall, webinar, or any other event that requires one-way audience engagement specifications, **Teams Live Events** and **Zoom Webinars** have expanded features to accommodate larger scale virtual events.

*For conferences and large scale networking events that require higher production amenities that include vendor lounges and virtual networking rooms, an additional product, **Accelevents**, provides an extensive hosting platform that can accommodate events with this level of interactivity.*

Chapman has all these tools available for virtual events within those categories, and they can be requested using the [Virtual Event Submission Form](#).

### **Determining Participant Roles:**

Virtual event organizers have the ability to designate roles on both hosting platforms that determine who can do what in the meeting or webinar. Determining these roles in the preliminary phase will ensure the event runs smoothly when it goes live.

Your event might consist of:

**Organizer:** The individual who set-up or planned the event. Because they will need access to the most permissions, the best suited role for them during the event is *Organizer/Host*.

**Moderator:** If the event is a panel, Q&A, or a larger scale event that requires a separate on-screen host, you will need a moderator. Because they will need more permissions to maintain the flow of the event, the best suited role for them is *Co-Host/Alternative Host*.

**Speaker/Presenter:** This individual contributes to the main content during the event via a presentation or panel discussion. The ideal role for them is *Co-Host/Presenter*.

**Attendee:** This individual attends the event. Because they will need the least amount of permissions, the ideal role for them is *Attendee/Participant*.

***Please Note:*** The permissions available to each role can be adjusted, restricted, or augmented by the event organizer. Please refer to the role descriptions below to determine if the default permissions for your team need to be changed.

## Roles and Permissions

### **Organizer/Host:**

#### Capabilities in **Microsoft Teams**:

- ❖ Speak and share video
- ❖ Participate in meeting chat
- ❖ Share content
- ❖ Privately view shared PowerPoint file
- ❖ Take control of another user's PowerPoint presentation
- ❖ Mute other participants
- ❖ Remove participants
- ❖ Admit people from the waiting room
- ❖ Change the roles of other participants
- ❖ Start or stop recording

#### Capabilities in **Zoom**:

- ❖ **Begin and end meeting**
- ❖ Speak and share video
- ❖ Share content
- ❖ Chat with participants and change who they can chat with
- ❖ Save in-meeting chat
- ❖ **Start, create or edit polls**
- ❖ Enter closed captions or **assign task to another user**
- ❖ Spotlight or stop participants' video
- ❖ **Promote participant to host or co-host**
- ❖ Remove, rename, invite participants
- ❖ Mute controls for participants
- ❖ **Create breakout rooms**
- ❖ Recording and **live streaming**

**Presenter/Co-Host\***: This role has the same permissions as the organizer/host, unless otherwise specified by the organizer/host.

\*Capabilities for this role are the same as those listed in the above "Organizer/Host" section by default, apart from **bolded** permissions.

\*Users designated as **Alternative Hosts** on **Zoom** can also begin and end meetings.

**Attendee/Participant**: This role has the least amount of permissions and is given to event attendees by default.

#### Capabilities in **Microsoft Teams**:

- ❖ Speak and share video
- ❖ Participate in meeting chat
- ❖ Privately view shared PowerPoint file

#### Capabilities in **Zoom**:

- ❖ Speak and share video
- ❖ Share screen
- ❖ Request or give remote control
- ❖ Chat with participants
- ❖ Answer polls
- ❖ Enter closed captions
- ❖ Invite others to join
- ❖ Start local recording

\*Have additional questions about licensing features and participant permissions? [Contact the IS&T team.](#)

## Optimizing Content and Quality

*Virtual events rely on engaging content to connect with the audience. When planning your event, it is important to consider whether your content can be presented in a way that will reflect the tailored Chapman experience.*

### Supplemental Materials

PowerPoint presentations and virtual handouts must be polished and maintain a clear, easy to follow structure that is relevant to the overall theme of the event. Chapman affiliated presenters must use the standard Chapman branded templates for all supplemental materials available in [SMC's Self-Service Branding Toolkit](#).

If there are pre-recorded elements incorporated into your presentation, please be advised that *the use of recycled footage or content is strongly discouraged*. Every virtual event should ideally utilize tailored, original content that aligns with the unique theme of the experience.

### Tools for Engaging in Real Time:

- ❖ **Polls:** Can be used to check-in with the audience, test their understanding of the material, or learn what they hope to gain from the experience
- ❖ **Chat Roll:** Can be used to keep track of what the audience is connecting with and discussing over the course of the event
- ❖ **Q&A:** Can be used to interact with the audience directly, expand on the discussion, and answer questions
- ❖ **Breakout Rooms:** Can be used to facilitate audience engagement in a setting where they can discuss their experience with peers and other attendees

### Copyright Compliance

If you are planning to incorporate the use of copywritten material in your event (i.e. film, music, literature, etc.), you are required to have obtained all necessary permissions prior to submitting your event request. The use of unapproved copywritten material during your event could result in immediate termination of the event upon presentation of the prohibited material.

For further guidance on Chapman's copyright guidelines, please visit the [Copyright FAQs](#) page provided by the Office of Legal Affairs.

***Please Note:** Work found within the "public domain" can be shown without obtaining a public performance license. However, this work must maintain the high standard of Chapman programming and will be subject to the same protocols as the rest of the event content. Event organizers must closely consider the necessity of the content chosen.*

### Accessibility

All virtual events must be fully accessible, including features like closed captioning and mouseless navigation. It is the event organizer's responsibility to make sure that these features are offered.

Chapman-owned products, like the licenses provided for Microsoft Teams and Zoom, include these features by default. To guarantee that these features will be available, it is important that only Chapman-owned products are used to host virtual events.

## Attaining a High Standard of Image and Audio Quality

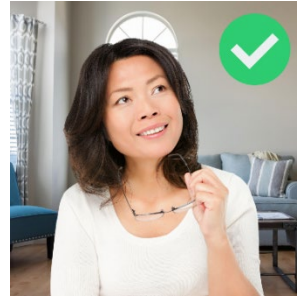
With all other considerations in place, including choosing the proper platform and event type, and ensuring your event is well organized, the following are guidelines that will help guarantee that the presentational and technical quality of your event is the best it can be.

### Presenting Yourself

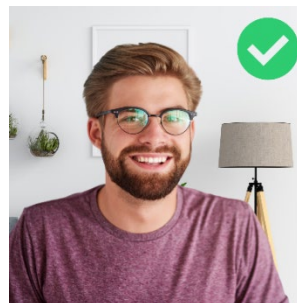
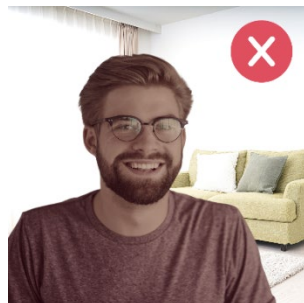
*When it comes to attire, a good rule is to treat any virtual event the same as its in-person equivalent. Representing Chapman in a professional and positive way is always necessary, and considerations for formal or business professional attire should be made, particularly if the event is directed to an outside audience. Just because an event is virtual does not necessarily mean that the event is more casual.*

### Maximizing Image Quality:

- ❖ Host the event from a **clean, simple space**; remove any distractions that may be present in the background.



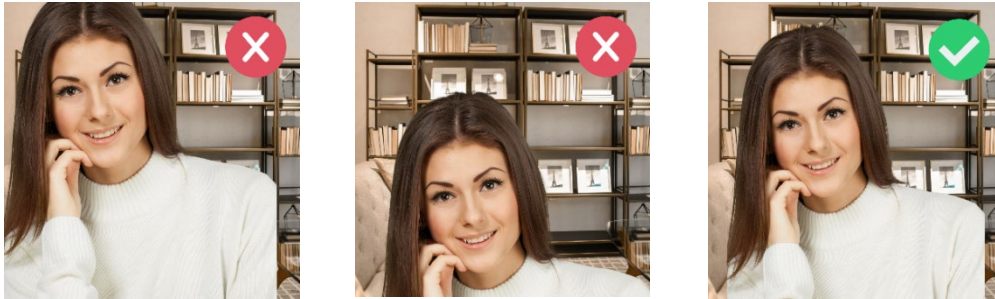
- ❖ Ensure that the hosts or presenters are lit properly. **Bright and soft, neutral colored light** is best: for example, indirect sunlight coming in from a window.
- ❖ Avoid being backlit, or having any bright light sources behind the presenter in the frame of the video, as this would make the foreground appear darker.



- ❖ Place whatever device is being used to stream video on a **stable surface**.



- ❖ Clean the camera lens of the device before the event.
- ❖ Avoid being too close or too far away from the camera. The presenter should be framed from **chest height up** and should have a bit of space in the frame above their head.



- ❖ Ensure to **close any unnecessary applications** so that only those necessary for the presentation are running on the device, as to maximize the amount of processing power that can be used for video streaming.

#### *A Note on Virtual Backgrounds*

While using the virtual background feature in both Zoom and Teams can be used to create a clean, Chapman-themed image, it can also cause problems or be distracting.

This technology isn't perfect, and can introduce glitches and degrade the quality of your presentation. ***Testing the performance of your virtual background before the event is live is essential to identify these issues.***

If these issues can not be resolved, ***do not use a virtual background.***

[Chapman-themed virtual backgrounds](#) are available for download, provided by IS&T.

#### **Maximizing Audio Quality:**

- ❖ **Host the event from a quiet space**, reducing as many sources of outside noise as possible.
- ❖ Depending on the type of event, consider the use of an **external microphone, headset, or earbuds with a built-in microphone**; these will give you better audio quality than the microphones that come standard in most laptops.
- ❖ To further reduce unwanted noise, **only the host that is presenting at the time should have their audio enabled**; those not appearing on-screen at the time should mute their audio input.

*There is always a risk of unintended or unexpected sound being introduced during an event, (road noise, airplane flyovers, pets, children, gardeners, etc.), so be prepared to mute your audio, if possible, at all times.*

## Rehearsals

Prior to going live with your event, **it is strongly recommended that you have a virtual rehearsal**. This will ensure that every member of your team is familiar with their role during the event, the content that will be presented, and the order of presentation. Organizers are encouraged to provide an **event script** that outlines these elements and any additional talking points at least 24 hours prior to the event date.

Rehearsal time should also be used to test your video and audio set up and resolve any technical issues that may arise.

Your unique pre-set event link is usable at any time prior to your event. Event organizers should schedule rehearsals with all team members at least two hours prior to the start of the event to allow enough time for a complete run through of the presentation.

## Promoting Your Event

You've put in the energy to organize your event, so don't forget the important step of promoting it. There are a variety of channels, both internal and external, to share out your event details.

### Step 1: Create a Listing on the Chapman Events Calendar

By logging into [events.chapman.edu](https://events.chapman.edu) with your Chapman credentials, you can submit your event to appear on the [public calendar](#). Make sure you add all event details and a strong image to entice possible attendees. Once submitted, your event will be reviewed and approved by Event Scheduling Services. You can use the event listing URL in your additional marketing efforts.

***Please Note:** Submitting directly to the events calendar is for remote events and external events. All other events happening physically on Chapman's campuses need to feed through the [25Live Event Scheduling System](#).*

### Step 2: Submit Your Event to Relevant Chapman Audience Communication Channels

Based on your target audience, there are a variety of channels useful for communicating about your event.

***Please Note:** Acceptance into any of these channels is at the discretion of the channel owners.*

### Current Students

- ❖ **Dean Price's Newsletter** – Sent weekly by Dean of Students Jerry Price on Sundays, this is a central communication channel for Chapman students. Submissions should be sent to [Elise Cimino](#) by Friday at noon.
- ❖ **Life@CU Social Media Channels** – To submit to Student Affairs' social media channels, contact Department Assistant [Karla Monterrey](#).

### Faculty and Staff

- ❖ **Working@Chapman Newsletter** – Sent twice a week on Mondays and Wednesdays, this newsletter is the central communication channel for Chapman faculty and staff. To submit, visit the [Working@Chapman submission form](#).

### Alumni

- ❖ **Alumni Newsletter** – Sent once a month during the first week, it is the central communication channel for Chapman alumni. If not already part of the content gathering process with Alumni Relations, reach out to the Manager of Alumni Engagement [Bill Guzik](#) to be added.
- ❖ **Alumni Social Media** – To submit to Chapman alumni social media channels, contact Social Media and Digital Marketing Specialist [Tod Brewster](#).

### Parents

- ❖ **Parents Newsletter** – Sent on the first of the month, this is the central communication channel for Chapman parents and families. If not already a part of the content gathering process with Parent Engagement, reach out to Parent Engagement Coordinator [Erica Evans](#) to be added.

### Community

- ❖ **Neighbor-to-Neighbor Newsletter** – Sent bi-monthly in print and every 4-6 weeks through email, this is the central communication channel for the community surrounding Chapman. These channels primarily feature free/low cost Chapman events that are open to the public. Contact Interim Vice President of Community Relations [Alisa Driscoll](#) for submissions.
- ❖ **Community Facebook Page** – To submit to the Community Relations central social media channel, contact Interim Vice President of Community Relations [Alisa Driscoll](#).

### Campus Digital Signage

- ❖ **Digital Signs** – Located throughout both Chapman campuses in Orange and Irvine, our digital signage screens are available for event promotions. Submit your slides directly at [signage.chapman.edu](https://signage.chapman.edu) (VPN/eduroam access needed). All slides will be submitted to a sign owner for review and approval. To learn more about slide creation, visit [brand.chapman.edu](https://brand.chapman.edu).
- ❖ **Wilsontron** – Located by the Wilson Field and the front of Argyros Forum, this large screen is a prime promotional channel for all campus visitors. Submit your slides directly at [signage.chapman.edu](https://signage.chapman.edu) (VPN/eduroam access needed). To learn more about Wilsontron slide creation, visit [brand.chapman.edu](https://brand.chapman.edu).

### Institutional Social Media

- ❖ **Central Accounts** – The content promoted on Chapman’s central social media accounts are pulled from the events calendar and newsletters. Make sure you promote there for a chance to be featured on these channels.
- ❖ **#ChapmanU** – Remember to tag or mention ChapmanU on your social media to connect with Chapman!

### School and College Channels

- ❖ Many of our schools and colleges have their own communication channels to speak with their specific audiences. Consider working with them directly to promote your event through their channels.

### **Step 3: Advertise (budget required)**

- ❖ To reach audiences beyond Chapman’s owned channels, a dedicated advertising budget is highly suggested. This would include channels like social media advertising, digital display ads, print ad, radio, etc. While many of these channels can be costly, starting with a targeted campaign on social media can do wonders. If you have budget and are interested in learning more about advertising options, contact [Strategic Marketing and Communications through their project request form](#).

### Additional Resources

**Self Service Collateral Options** – To order invites, flyers, etc., you can make use of [SMC’s Self-Service Branding Toolkit](#).

## Security and Troubleshooting

*Proper organization and set-up go a long way to ensure that your event runs smoothly when it goes live. Even with these considerations in place, however, problems may still arise.*

### Security

“Zoom Bombers” and others can and have been successful in hijacking public events hosted on virtual platforms without the proper security measures being put in place. Both Microsoft Teams and Zoom have these security features available during event set-up that will minimize this risk. More information can be found on [IS&T’s Zoom Bombing Prevention page](#).

- ❖ Requiring registrations, (even for free, open-to-the-public events), is strongly recommended to ensure that the attendees are those you **want** attending your event
- ❖ The “waiting room” feature, also strongly recommended, can be utilized to manually screen attendees prior to event start
- ❖ An additional security feature is the ability to “lock” a meeting after the event starts, preventing any other additional attendees from joining the meeting – if you know that all of your expected attendees are present and accounted for, you should lock the meeting for the remainder of the event
- ❖ For “Meeting” type events, where attendees are directly participating, the attendee screen-sharing feature should be either disabled or set to require permission from the host

### Troubleshooting

Audio/visual or other technical issues may arise while the event is live, even with thorough preparation. While rehearsing your event, make sure to also **prepare for what to do if things go wrong**.

#### Preemptive Measures:

- ❖ Close all unnecessary windows or programs (i.e. irrelevant web pages, software, or documents)
- ❖ Disconnect any devices connected to your WiFi that won’t be used during the event
- ❖ Set up your workspace so as to guarantee a strong and stable wireless signal. Event hosts should also consider using an ethernet cable during the event as a backup in case of wireless connection issues.

*It is incredibly useful to have a co-host or co-presenter that can take over if another host or presenter has technical difficulties. If any technical issues arise for the host, a co-host can quickly take over and continue the event until the issues can be resolved.*

Having as much control as possible over what attendees are allowed to do during the event, especially if there are many attendees displaying video and audio, will allow you to take control quickly (for example, disabling a video feed or muting an attendee's audio if unnecessary or distracting noise is being introduced).

*\*Have additional technical questions, or questions about implementing security features for your event?*

[Contact the IS&T team.](#)

## Post-Event Evaluation

Upon the completion of your virtual event, it is important to **follow up with attendees** and provide all participants – attendees, presenters, and any additional members of your team – with the opportunity to submit an evaluatory review. This can help provide insight for future planning, changes, and improvements.

Microsoft Teams and Zoom have functionalities that will allow you to generate **attendee reports**, which can be very useful for feedback, marketing, or future event planning.

Event organizers are also strongly encouraged to create a personalized evaluation form for attendees specific to their virtual event. This will allow for the most accurate feedback to help you assess if your particular objectives were met.

### Questions to consider:

- ❖ *Were all event objectives met?*
- ❖ *What went well during the event?*
- ❖ *What improvements can be made?*
- ❖ *Was this effective as a virtual event?*
- ❖ *Should this event be repeated in the future? If so, should it remain in this format?*
- ❖ *Are there any ideas or suggestions that you have for future events like this one?*

A recording of the event, if that feature is implemented in Microsoft Teams or Zoom, can also be shared with attendees directly or be hosted online for viewing after the event has concluded.