

CARL’s Guidelines for Online Event Management

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***Quick Access:** [Consent form for Event Presenters](#)

Preamble

The Canadian Association of Research Libraries is dedicated to facilitating high-quality, inclusive, and engaging online events. As virtual meetings and webinars have become integral to our professional landscape, having clear and consistent guidelines is essential to ensure these events are conducted smoothly and effectively.

These guidelines are designed to assist event organizers and presenters in understanding the best practices for conducting online events under CARL's auspices. They aim to ensure the privacy and preferences of presenters and participants are respected while streamlining the process of organizing and conducting online events, making it easier for everyone involved.

The guidelines cover a comprehensive range of topics, including the rationale for recording events, determining which portions should be recorded, selecting the appropriate platform and format, obtaining consent from presenters, and strategies for disseminating recordings and presentation materials. The CARL liaison can assist in choosing the best options for your event.

In addition to these guidelines, CARL has created a [consent form](#) to obtain presenters' permissions for recording or sharing presentation materials.

Considerations of Recording Decisions

When planning an online event, it is essential to carefully consider whether the event should be recorded. Below are some key considerations to help guide this decision.

Criteria for Deciding Whether to Record an Event

- *Audience needs:* Assess if the target audience will benefit from having access to the recording. This includes considering whether attendees might have scheduling conflicts or time zone differences that prevent them from attending live.

- *Content sensitivity:* Evaluate if the event will cover sensitive or confidential topics that may inhibit open and candid discussions if recorded.
- *Event format:* Consider whether the format of the event (e.g., formal presentations vs. informal discussions) is conducive to recording.
- *Presenter preferences:* Respect the preferences and consent of speakers regarding the recording of their presentations.

Benefits of Recording

- *Resource availability:* Recordings provide a valuable resource for those who are unable to attend the event live, ensuring broader access to the content.
- *Legacy materials:* Recording events helps create legacy materials and resources for the community, supporting ongoing learning and reference.
- *Extended engagement:* Recordings enable further opportunities for discussion and engagement beyond the event itself, fostering continued dialogue within the community.

Potential Drawbacks of Recording

- *Reduced participation:* The presence of a recording may deter participants from speaking candidly, especially if discussing sensitive or controversial issues.
- *Informal presentations:* Some speakers may prefer to deliver informal presentations and may feel uncomfortable being recorded, which could impact the quality and authenticity of their delivery.
- *Language barriers:* In instances where translation is not offered for online events (see Guidelines for Translation and Transcription section below), it may create inequitable access to the resulting resource.

Recording Options

When deciding to record an event, it is important to determine which parts of the event should be included in the recording. Below are various options for recording parts of an event, ensuring that the recordings serve the intended purpose while respecting the needs and preferences of all participants.

1. No recording:

- Opt not to record any part of the event.
- Suitable for events where privacy is a priority, or when informal and candid discussions are encouraged.

2. Record presentation(s) only:

- Record only the main presentations, excluding Q&A, breakout sessions, or any other group discussions.
- Focuses on capturing the key content while allowing the Q&A and breakout session discussions to remain private and informal.
- This is the most common scenario for online events at CARL.

3. Record full event:

- Record the entire event, including all presentations, discussions, and Q&A sessions.
- Provides a comprehensive archive of the event for those who could not attend or for future reference.

Informing Participants of Recording Decision

To ensure transparency, obtain proper consent, and manage expectations, participants must be informed in advance if the event will be recorded. This practice respects the privacy and preferences of all attendees. Participants should be informed which of the three recording options is selected in all of the following ways:

1. The event announcement.
2. The event registration.
3. Participants should be informed orally during the opening of the event whether and what parts of the event will be recorded.

Obtaining Consent from Presenters

To respect presenters' preferences and privacy, it is essential to obtain consent for recording and sharing presentation materials. CARL has put together a [consent form](#) to obtain presenters' permissions. The following guidelines outline the process for obtaining and documenting this consent.

Process for Obtaining and Documenting Consent

- Organizers should reach out to all presenters well in advance of the event (at least 2 weeks beforehand) to inform them about the recording and sharing practices, and share the consent form.
- Clearly explain which parts of the event will be recorded, how the recordings will be used, and where they will be shared (e.g., CARL's digital communication channels such as the website, YouTube channel, and relevant listservs).
- Make sure to share consent form responses from presenters with CARL liaison.

Handling Preferences and Privacy Concerns

- Respect the preferences indicated by the presenters in the consent form. If a presenter does not consent to recording or sharing slides, the event cannot be recorded and slides will not be shared.
- If a presenter has privacy concerns, you can offer alternatives such as:
 - Sharing slides without recording the presentation

- Having a note-taker provide an anonymized summary of the presentation.

Online Event Platform and Format Considerations

CARL uses the Zoom platform to host its online events. The two primary Zoom formats available are Meetings and Webinars, each with distinct features and use cases. Selecting the appropriate format ensures the success and effectiveness of online events. Below are the guidelines and considerations for choosing the right type of Zoom event for your needs.

Differences Between Meeting and Webinar Formats

- **Meetings:**

- Interaction: Designed for interactive and collaborative sessions where all participants can share their audio, video, and screen.
- Capacity: Suitable for smaller groups, typically up to 100 participants.
- Features: Includes breakout rooms, polling, chat, reactions, and the ability for participants to unmute themselves and interact freely.
- Participation: All attendees can participate actively, making it ideal for discussions, brainstorming sessions, and group work.

- **Webinars:**

- Interaction: Designed for larger audiences where interaction is more controlled. Typically, only hosts and panelists can share their audio, video, and screen.
- Capacity: Can host a larger number of participants for a maximum of 500 per webinar.

- Features: Includes Q&A, chat (with moderation options), polling, and the ability for attendees to view but not interact unless permitted.
- Participation: Attendees are in view-only mode by default, making it suitable for presentations, lectures, and broadcasts where controlled interaction is necessary.

Criteria for Choosing the Appropriate Format

- **Audience Size:**

- Meetings: Best for small to medium-sized groups where active participation is encouraged.
- Webinars: Ideal for larger audiences where the primary focus is on content delivery from a few presenters.

- **Level of Interaction:**

- Meetings: Suitable for events requiring high levels of interaction among participants, such as workshops, collaborative sessions, and committee meetings.
- Webinars: Suitable for events with limited interaction, such as lectures, keynote presentations, and panel discussions, where control over participant interaction is needed.

- **Control and Management:**

- Meetings: Allows more participant control, which can lead to potential disruptions but is beneficial for dynamic discussions.
- Webinars: Provides greater control for hosts and panelists, minimizing disruptions and maintaining focus on the presenters.

Use Cases for Each Format

- **Meetings:**

- Internal team meetings: Regular check-ins, brainstorming sessions, and collaborative projects where team members need to interact freely (ex. Steering Committee Meetings).
- Training sessions: Hands-on training where participants need to engage actively, ask questions, and share screens.
- Community discussions: Informal discussions, support groups, and community-building activities where open dialogue is encouraged (ex. Community of Practice call)
- **Webinars:**
 - Formal presentations and lectures intended for a broad audience where questions need to be submitted beforehand and where participants can communicate with panelists via chat or Q&A feature.
 - Keynote presentations: High-profile events where a few speakers deliver content to a large audience with limited interaction.

Guidelines for Translation and Transcription

To ensure accessibility and inclusivity for our diverse audience, CARL has established the following guidelines for providing transcription and translation services during online events. These guidelines aim to balance resource availability with the need to make content accessible to both English and French-speaking participants.

CARL will continuously assess the availability and accessibility of its translation and transcription services, seeking feedback from participants to make necessary improvements.

Simultaneous Translation

Simultaneous translation may be offered for webinars that CARL staff determine to be of wide-ranging and long-term interest, with recordings



expected to be viewed by a broad audience. (There is a cost to this choice that is borne by CARL.)

During applicable sessions, translation will be provided in real-time, allowing participants to choose their preferred language (English or French) during the live event.

Participants should be informed in advance about the availability of translation and transcription services for the event. Details about the translation and transcription services should be clearly stated in the event announcements and registration materials.

Both the French and English recordings may be posted to CARL's YouTube channel after the event to ensure accessibility for future viewers.

Non-Translated Events

Simultaneous translation is not typically offered for community of practice calls, less formal webinars, and webinars with fewer attendees.

Automated Transcription

Automated captions generated by Zoom or YouTube will be available for all recorded sessions. These automated captions help enhance accessibility for viewers, providing a text representation of the audio content.

Transcription services beyond automated captions will not be provided.

However, it is recognized that automated captions may not be perfectly accurate and might contain errors. Participants should be informed that these captions are generated automatically and are not professionally transcribed.

Guidelines for Dissemination

Recordings

CARL ensures that online event recordings are shared respectfully and with the goal of maximizing their reach and impact. Recordings may be distributed by CARL staff through the following platforms:

- CARL's Youtube Channel: the recording can be uploaded to CARL's Youtube Channel and added to the appropriate playlist.
- CARL Website: The recording can be added to the organizing group's page or any other relevant page on the CARL website.
- Listserv: The recording can be shared via the appropriate Listservs.
- Other social media: the recording can be shared via other social media platforms, such as Twitter.

Presentation Materials

CARL ensures that presentation materials which were broadcasted during an online event are shared effectively, respectfully, and in a manner that maximizes their reach and impact. Presentation materials, including slides, may be distributed by CARL staff through the following platforms:

- Listserv: Presentation materials can be shared via the appropriate Listservs.
- Google Folder: Presentation slides can be shared as a link in an appropriate Google folder managed by CARL.
- CARL Website: Presentation slides can be shared to the organizing group's page or any other relevant page on the CARL website.

Zoom Event Chat

At CARL, we value and respect the privacy of our event participants, including their informal interactions in the event chat. Our policy is not to share the event



chat externally to preserve the confidentiality and comfort of participants. However, we recognize that valuable insights and resources may emerge from these discussions, which can enhance the overall conversation and provide additional benefits to the community.

If you would like to capture key insights, comments, and resources shared in an event chat, we suggest that a note-taker be assigned for the event. The note-taker should ensure that all names of participants are removed in the documentation. They should also avoid including personal or off-topic discussions in their notes. A good practice would be to inform participants at the beginning of the event that a note-taker will be documenting key points from the event, including the chat, for reference purposes. Assure them that their names will not be associated with any captured content.

For any questions or additional information, please contact: info@carl-abrc.ca