THE VIRTUAL PIVOT

How The 2020 Carnegie Summit Transformed from an In-Person Event to A Virtual Experience

Carnegie Foundation
for the Advancement of Teaching

Carnegie Foundation for the Advancement of Teaching | Stanford, CA | June 2020

The Virtual Pivot

HOW THE 2020 CARNEGIE SUMMIT TRANSFORMED FROM AN IN-PERSON EVENT TO A VIRTUAL EXPERIENCE

JUNE 2020

Table of Contents

Acknowledgments

The Carnegie Foundation is grateful to our Summit sponsors that stayed the course with us for our re-imagining of the Summit. Without their enduring commitment, this work would not have been possible.

Leaders:
Bill & Melinda Gates Foundation
S.D. Bechtel, Jr. Foundation
William and Flora Hewlett Foundation

Supporters:
American Institutes for Research
Carnegie Corporation of New York
National Education Association
W.K. Kellogg Foundation
Walton Family Foundation
WestEd

Friends:
Fundación Educacional Oportunidad
New Visions Public Schools
Overdeck Family Foundation
Raikes Foundation
Wallace Foundation

Additional support from:
American Federation of Teachers
Nellie Mae Education Foundation

Core operating support for the Carnegie Foundation for the Advancement of Teaching is provided by the Carnegie Corporation of New York.

The suggested citation for this document is: The Carnegie Foundation for the Advancement of Teaching, (2020). *The Virtual Pivot: How the 2020 Carnegie Summit Transformed From an In-Person Event to a Virtual Experience.* Stanford, CA: Author.

Summit on Improvement in Education

The Summit on Improvement in Education engages a growing community of education professionals, including school and district leaders, staff from charter management organizations, leaders in state departments and professional organizations, entrepreneurs, and faculty from higher education organizations. It serves as an integrative and energizing force, bringing together individuals from diverse professional roles who typically do not attend the same professional meetings.

The Summit community continues to grow in size, going from 400 attendees at the inaugural conference in 2014 to more than 1,700 attendees in 2019, but it has also grown in thought and practice. It extends opportunities for those new to improvement to learn more about the productive use of improvement principles, networks, and supportive methods and tools; for those already engaged in improvement to present on their progress in sessions and at poster receptions; and for all to learn from others realizing measurable improvement in processes and systems and achieving more ambitious goals for the students they serve.

As the Summit grows each year, one thing remains the same: Carnegie's unwavering commitment to provide a high-quality experience for attendees. Scheduled for April 1–3, the 2020 Summit was on target to reach our goal of 2,000 attendees until the COVID-19 pandemic forced us to cancel the in-person event on March 9. Knowing the distinct opportunity afforded by the Summit learning environment, the connections among educational professionals and their problems of practice, and the disciplined efforts to advance improvements on these problems, Carnegie made the resolute decision to reimagine the Summit as a virtual learning experience over the same dates and with the same quality that is delivered at the in-person meeting.

Our Vision for a Virtual Summit

Our vision was simple but challenging to achieve: Create a virtual opportunity for the Summit improvement community to learn from and network with each other and do so with the same quality that is delivered at the in-person meeting.

The resulting Virtual Summit schedule leveraged digital technology to offer three keynotes, 43 breakout sessions, 25 on-demand prerecorded breakout sessions, and 22 virtual poster presentations over the course of the three days. In moving the conference into the virtual space, what began as a necessity became an opportunity for presenters to think more creatively about how to enhance social learning in their sessions and deepen connections among attendees. After the Summit, we curated the digital content from the virtual sessions into a resource for improvers to draw from into the future.

The aim of this report is to document what we did to pivot from an in-person to a virtual event within three weeks—while working remotely without the benefit of face-to-face meetings and huddles. When relevant, we included specific changes that we would make if we were to convene the Summit community remotely once again.

The primary audience of this report is Carnegie Foundation's Summit team, colleagues, and partners. We have structured the report to detail what we did and, in the spirit of improvement, provide changes based upon what we learned.[1] We will also make it available to other education enterprises upon their request.

[1] It is important to note that we think many of these changes would have been possible if we had more than three weeks to flip the event.

Summit Organizational Structure

Since the first Summit in 2014, Carnegie has used internal teams as our organizational structure. The existence of these teams allowed Carnegie to rapidly pivot its tasks and processes for the virtual event.

Project Leadership

The Summit Director and Chair are responsible for the overall design and execution of the Summit.

Core Team

The Summit core team consisted of staff responsible for the many aspects of the Summit, including:

- Registration
- Venue (catering, AV, room setup, etc.)
- Publications and printing (signage, on-site program, etc.)
- Communications (website, marketing, social media, etc.)
- Mobile app
- Staff engagement and on-site support

Program Team

The Summit program consists of four strands: Methods of Improvement Science and Networks, Improvement Science in Practice, Improvement Networks in Practice, and Leadership for Improvement. Each strand has a program lead who is responsible for developing and supporting its sessions and presenters. The program leads also review and determine the poster presentations to be included in the Summit.

This process begins the summer prior to the Summit with an RFP process and continues throughout the fall and winter with at least one planning call for each session.

Keynote Support Team

The keynote support team works closely with Summit keynote presenters and the AV company to ensure the quality of the keynote content and the execution of the presentation. This includes planning calls, creating run of shows (a document that lays out the timing, program, and content for each moment of an event), rehearsals, and presentation management.

Session Monitors

Carnegie staff have always served as session monitors at the in-person Summit. Their role is to support attendees, breakout session presenters, and associated AV and logistics. Moving the Summit to an online space did not change the need for this role, but it significantly affected the training and supports provided to the session monitors. A team of Carnegie staff were trained as session monitors, and each live session was assigned two session monitors. The support of the session monitors was key in the virtual space.

Zoom Technical Support

Carnegie staff had already been utilizing Zoom for several months prior to pivoting to the virtual Summit as part of a part-time work-from-home policy. The Zoom technical support team quickly became key in supporting the staff's deeper knowledge and understanding of the videoconferencing platform, as well as providing support to attendees.

Video Processing Team

All breakout sessions (both live and prerecorded) were recorded on Zoom. Prior to the virtual Summit, the prerecorded sessions needed to be processed and hosted to an online video streaming platform so that Summit attendees could watch them on demand. As each live breakout session concluded, its individual Zoom recording also needed to be similarly processed so that attendees would be able to access it on demand as well. The video processing team handled the processing of all Zoom recordings. Their work involved exporting the Zoom mp4 files into iMovie, checking for any issues that might require minor editing, and uploading the sessions to Vimeo (an online video streaming platform) for viewing.

Technology Is Essential

With Zoom as our Summit platform, we had to ensure that we had optimal technical infrastructure to deliver a virtual Summit, which required us to leverage various supporting technologies that proved to be critical in pivoting to a virtual Summit event.

Zoom: The Virtual Summit Platform

Ensuring that our infrastructure was sufficient

Pre-Summit context: In November 2019, Carnegie had upgraded Zoom from Pro to Business, which allowed an increase in the number of Zoom participants in meetings from 100 to 300. As part of that upgrade, we also acquired the Zoom Admin Dashboard, which allowed us to monitor meetings from a global view to see meeting stats such as participant count, recording status, screen-sharing status, and AV status with network latency information. Individual Zoom accounts can host meetings with up to 300 participants each, and the Zoom webinar account can stream keynotes with up to 1,000 participants.

We confirmed that Carnegie had adequate cloud storage to hold all the Zoom recordings and researched upgrades (storage, number of participants, etc.) that could be purchased if needed. Our IT team also contacted Zoom to confirm it could also handle the lift.

Confirming Carnegie staff's understanding and experience with Zoom features

All Carnegie staff already had Zoom accounts and a basic understanding of its features, while many others were using it more frequently and extensively. Our Public Education Offerings (PEO) staff were proficient in using Zoom and its features on a smaller scale. This experience gave us the confidence that the Summit sessions, designed for an in-person meeting, could be adapted to a digital platform. The PEO staff were instrumental in quickly training Carnegie staff who served as session monitors.

Customizing the Zoom session settings and assigning hosts

While all staff had their own Zoom accounts, we decided to utilize new, unused Zoom accounts for the Summit breakout sessions. This allowed us complete control over the settings and access to all recordings for each account. Some of the more crucial settings included:

- Disabling "Join before host"
- Enabling "Waiting Room"
- Using "Mute participants upon entry"
- Using "Host only" screen-share abilities

Each live session had a specific Zoom account assigned to it, and session monitors were asked to log in to that specific account. Doing so gave them host capabilities that allowed them to manage many aspects of Zoom (e.g., launching polls, structuring breakout rooms, designating others as co-hosts). As a backup precaution, we added Carnegie staff involved in a specific session as alternate hosts to Zoom. In the event that the host's internet connection dropped, an alternate host would be able to take over and have full host capabilities.

Testing the technology and internet connectivity

We scheduled and conducted a planning/design call with the presenters for each breakout session.[2] These calls were led by the program strand leads. The aim of the call was to review the agenda, determine what Zoom functionality would enhance the attendee experience, and discuss roles and responsibilities (e.g., who would introduce the session, manage the breakouts, set up a poll, review the chat). Carnegie session monitors and Zoom technical support staff joined these calls. Zoom technical support staff tested the connectivity for each presenter and provided tips, such as "sit closer to your router" or "use an Ethernet cable" to improve connectivity. Most presenters were experienced using Zoom; those who were not were eager to learn.

CrowdCompass Mobile App

This was our second year using CrowdCompass, Cvent's mobile event app, so we were familiar with its functionalities and had already set up the mobile app when the pivot happened. Attendees needed to be registered for the Summit through the Cvent registration system in order to gain access to the mobile app. All 100+ in-person breakout sessions had already been added to the app, along with the 250+ session presenters and posters. A small but increasingly growing percentage of registered attendees had already logged in and had begun building their on-site schedule by selecting breakout sessions.

The app allowed session materials, such as slide decks and handouts, to be uploaded to each session for participant access. The app had an online web browser companion that also provided a vehicle to share the Zoom links and prerecorded session video links with (only) registered Summit attendees. Registered attendees could attend the live Zoom sessions by accessing the session links in the app or web browser companion. For all of these reasons, it was an easy decision to move forward with using CrowdCompass as the virtual Summit content vehicle.

The major benefit of CrowdCompass is that it is tied to our Cvent registration system. It also provides all the basic needs for attendees of an in-person event (session schedules, sponsor information, hotel maps, attendee list and chat, push notifications, and material management such as slide decks, handouts, and surveys). Because it is designed for an in-person event, one major limitation when we moved to the virtual space was its inability to handle different time zones. Since the in-person Summit was to be held in San Francisco, the CrowdCompass mobile app reported all times as Pacific Time. Given that we had attendees from across the nation and globe, we worked around the issue by placing reminders, whenever possible, that all times listed in the mobile app were Pacific Time.

Smartsheet

Smartsheet is an online project management system that Carnegie's project managers have been utilizing for several years. While it was already used to manage all project details, timelines, and processes for the in-person Summit, its use became crucial in the pivot to the virtual Summit. With the creation of a shared virtual Summit workspace in Smartsheet, team members were able to organize and access up-to-date information, which allowed for the work to move forward quickly and efficiently. Some of our specific uses of Smartsheet follow:

- Collecting information from presenters (examples: Virtual Presenter Interest Survey, Virtual Poster Ideas, Session Monitor Data on Processing Live Session Recordings)
- Tracking details of all fronts (read-only version examples: Programming Tracker, Video Processing Tracker)

---

[2] An initial design call had already been conducted for the in-person conference, and session agendas were finalized.

- Serving as a central repository for everything that team members needed to know about a live breakout session, such as the date and time, presenter and session monitor names, and the session Zoom account (read-only version example: Final Schedule Grid)

Presenter Upload Portal/JotForm

The presenter upload portal is a tool we have used for many Summits. It is a JotForm embedded in a web page that allows presenters to upload their slide decks and any other handouts they would like added to their session descriptions. The files are automatically saved in a shared Dropbox folder where they can be processed. This tool has been incredibly helpful because it moves the management of session materials out of individual email inboxes and into a shared space.

Dropbox

Carnegie has been using Dropbox for many years, with the technology playing a key role in the Summit. For the virtual Summit, it housed, organized, and controlled versions of all materials in one central repository so that all team members had access to these materials at any given time.

MS Teams

Within the last year, Carnegie adopted MS Teams as its main vehicle for staff online conversations. While it had been utilized heavily during the planning of the on-site Summit, it played an important role in the virtual Summit. It is important to keep in mind that, of the three weeks we had to flip the conference, staff were only in the office for the first week and worked remotely from home after the shelter-in-place order went into effect. We created a Virtual Summit Team and several channels for the different teams. For example, the keynote support team used it as a back channel to chat and troubleshoot, the program support team used it for quick communications, and the mobile app support team used it to ensure any bugs found in the app were fixed immediately. Most crucially, the session monitor team used it extensively during the Summit to share and troubleshoot issues in real time.

Vimeo

Vimeo is an online video streaming platform that Carnegie had used in the past, so staff were familiar with it. Given the high costs of hosting recordings on Zoom's platform, we knew we needed to find a more semi-permanent and affordable home for the session recordings. We were able to confirm that Vimeo could host our recordings and provide other useful features, including limiting the accessibility of the recording URLs to registered attendees only and ensuring that they were not publicly found by searching either on the Vimeo website or the internet.

YouCanBook.me

Both the in-person and virtual Summit required scheduling multiple meetings with multiple participants. Given the tight turnaround time and the necessity of an additional planning call with each live breakout session, we decided to test this online scheduling software. All live-session presenters were required to book a 30-minute slot to run through their virtual session designs, the Zoom functions they were planning to use, and general equipment setup. By using this software, we were able to get planning calls for all 40+ live sessions scheduled into the week prior to the Summit.

DocuSign

We needed a way to collect presenters' legal agreements to share their Summit session recordings with Summit attendees. The software proved easy to use on both ends.

Virtual Summit Program Development and Support

Carnegie's 7th annual Summit on Improvement in Education was scheduled for April 1–3, 2020, in San Francisco. At the time that the COVID-19 pandemic forced us to cancel the in-person event and Carnegie executives decided to move forward with a reimagined virtual event, we had detailed plans and agendas for two site visits, 11 full-day preconference courses, 103 breakout sessions, and 76 poster presentations and were on target to meet our goal of 2,000 attendees. Site visits and full-day preconference courses were canceled immediately given how difficult they would have been to move to the virtual space.

Determining the Schedule

We scheduled the virtual Summit over the same dates as the in-person meeting because presenters and registered attendees had already booked these dates on their calendars. Programming was scheduled each day between 8:30 a.m. PT and 3:30 p.m. PT to accommodate the different time zones.

While the in-person Summit breakout sessions were either 60 or 75 minutes, we decided to allocate each breakout session a standard 90 minutes. Presenters could decide the optimal length for their presentations, but 90 minutes was the maximum length. This allowed us to include three breakout sessions and a keynote each day with a 30-minute break between sessions. Attendees would be able to take a break between sessions, and presenters and monitors would have 15 minutes to set up prior to each session. The final Summit program included eight sets of live sessions with five to six concurrent sessions over the three days.

The virtual Summit schedule:

Tuesday, March 31	2:30 p.m. PT	Opening Keynote: Anthony Bryk
Wednesday, April 1	7:30 a.m. PT	Coffee and Poster Viewing
	8:30 a.m. PT	Breakout Sessions Set 1 (6 Live, 3 Pre-Recorded Sessions)
	10:30 a.m. PT	Breakout Sessions Set 2 (5 Live, 3 Pre-Recorded Sessions)
	12:30 p.m. PT	Breakout Sessions Set 3 (5 Live, 3 Pre-Recorded Sessions)
	2:30 p.m. PT	Keynote: Francesca Gino
Thursday, April 2	7:30 a.m. PT	Coffee and Poster Viewing
	8:30 a.m. PT	Breakout Sessions Set 4 (5 Live, 3 Pre-Recorded Sessions)
	10:30 a.m. PT	Breakout Sessions Set 5 (6 Live, 3 Pre-Recorded Sessions)
	12:30 p.m. PT	Breakout Sessions Set 6 (6 Live, 3 Pre-Recorded Sessions)
	2:30 p.m. PT	Keynote: John Diamond and Amanda Lewis
Friday, April 3	7:30 a.m. PT	Coffee and Poster Viewing
	8:30 a.m. PT	Breakout Sessions Set 7 (6 Live, 4 Pre-Recorded Sessions)
	10:30 a.m. PT	Breakout Sessions Set 8 (5 Live, 3 Pre-Recorded Sessions)
	12:30 p.m. PT	Closing Remarks: Anthony Bryk

What would we do differently?

- End days earlier for attendees from the East Coast.
- Schedule longer breaks between sessions (45 minutes) to meet the needs of attendees and presenters setting up their sessions.
- Include a lunch break of at least an hour.
- Structure within each day networking time, such as coffee chats, happy hours, and meetups, for people to connect by similar roles or specific problems of practice.

Preparing for Keynotes

When we first decided to pivot to a virtual Summit, we planned to livestream the keynotes from local universities with livestreaming capabilities. By the end of the first week, it became clear that universities and other institutions would most likely be closed. In week two, we researched local AV vendors with recording space and equipment. By the end of week two, those locations also became increasingly unlikely given the shelter-in-place order. By week three, we resorted to our last option of using Zoom webinar technology to live stream the keynotes because of its capacity to (1) allow the speaker to share slides, (2) provide a simple way to manage a one-to-many presentation, (3) accommodate presenters being in multiple places at the same time, (4) provide real-time analytics of attendance, and (5) record the presentation directly so that it could be saved for viewing later.

However, because the Zoom webinar platform was less familiar to us, keynote preparations required multiple rehearsal sessions with the keynote presenters and Carnegie staff. Like the in-person Summit, run-of-show documents were created for each keynote, which was essential because working through each of the many transitions within each keynote proved to be especially tricky.

The virtual Summit included three keynote presentations, and they were all a bit different. Tony Bryk presented his keynote live from a podium in the Foundation; Francesca Gino presented from her home; and the duo John Diamond and Amanda Lewis each presented from their separate homes. A fourth keynote of Father Gregory Boyle was originally scheduled, but we canceled it for the virtual Summit due to his concern about being unable to make an emotional connection with people without an in-person audience.

What would we do differently?

- Enable the chat feature (with agreement of the presenters) so that attendees can comment and converse with each other as the keynote is happening.
- Ensure that keynote presenters have adequate lighting and bandwidth for their presentations and videos at their locations.
- Schedule practice sessions to increase the keynote presenters' skill and confidence with the technology.
- Prepare and iterate on run-of-show documents internally before engaging keynotes in a planning session.
- Provide adequate time for run-throughs with each keynote presenter.
- Reduce the length of each keynote presentation from 50 to 30 or 40 minutes.
- If possible, have keynote speakers present from a professional video studio, standing versus sitting, where the quality of the camera, lighting, and microphones will be superior to what is available at home.

Determining Live and Pre-Recorded Sessions

Realizing that not all session designs would be amenable to a virtual presentation, we reached out to our Summit presenters to assess their interest and willingness to pre-record their sessions or to present them live on Zoom. Presenters responded to a [Smartsheet survey]() with their preferences. Nineteen were not interested in presenting in either format, 34 were flexible and would pre-record or present live, six selected to pre-record, and 43 preferred presenting live on Zoom. Considering the breakout session design, interactivity, presenter experience with Zoom technology, and attendee interest in the topic, each program strand lead proposed sessions within their strand that could be presented live or pre-recorded.[3] The final virtual program included 43 live sessions and 25 pre-recorded sessions.

Supporting Breakout Session Presenters

Given the tight turnaround time, it was crucial that we created and shared with clarity the development timeline and process steps for preparing and supporting both the pre-recorded and live-session presenters. We quickly developed and shared a resource guide for each session type that included all need-to-know aspects of their commitments. We also called upon staff with deeper knowledge of virtual teaching using the Zoom platform to help revise and improve these tools, resulting in the Resource Guide for Live Sessions and the Resource Guide for Pre-Recorded Sessions.

Embedded within the Resource Guide for Live Sessions was a link to a Presenter Virtual Hosting FAQ that introduced Zoom and provided tips on how to use it effectively as a teaching platform. We also developed a set of Zoom instructional slides introducing attendees to key Zoom functions that presenters had the option of including.

As part of the process, we required that all live-session presenters schedule a 30-minute Zoom Design/Technical planning call appointment via YouCanBook.me to help support a high-quality experience for presenters and attendees. Once a planning call was booked, each presenter received a calendar invite with the Zoom link and the standard agenda for the call. Planning calls for all 40+ live sessions took place in 30-minute increments throughout the week prior to the Summit, with a 15-minute buffer in between calls. Planning calls were facilitated by a program strand lead, a member of the Zoom support team (to troubleshoot Zoom, internet, or equipment issues), and one or both session monitors (to help them become familiar with the presenters, the session design, and the Zoom features being used). Session monitors were also added as alternate hosts to their calls so that they would have access to and be able to practice with the same Zoom host function privileges they would use during the live session.

Following the planning calls, the program strand leads continued to work closely with live-session presenters as needed. In some cases, they helped revise session titles and descriptions to reflect changes in the redesign to a virtual format; in other cases, they provided additional support for Zoom tools and followed up with presenters to upload their session materials so that they would be available for attendees to view prior to the virtual event. In general, the pre-recorded-session presenters required minimal support.

Each year, we create standard slides for each breakout session, which include a title PowerPoint slide to display in the breakout session room when attendees enter and an evaluation slide to project at the close of a presentation. These slides serve as a reminder to encourage attendees to share their session

[3] The live sessions were recorded during their presentations for inclusion in our digital library, where they could be accessed later for on-demand viewing.

feedback. For the virtual Summit, we revised both slides to reflect the virtual (and recorded) nature of the sessions and asked that presenters include them in their slide decks.

What would we do differently?

- Given that all session planning calls included a discussion about Zoom features to engage attendees, we would in the future schedule a training session (offered multiple times to accommodate presenter schedules) about the use of Zoom tools. Presenters would then be better prepared to discuss the features that they would like to incorporate into their session designs during their planning call.
- The Zoom Design/Technical calls were scheduled for 30 minutes with a 15-minute buffer in between calls. It was rarely enough time; 45-minute calls with a 30-minute buffer in between would have been more ideal.
- While we asked session presenters to revise the session design sheet that they prepared for the in-person Summit to include the Zoom features they planned to use, we would in the future create a detailed facilitator session-agenda template that would include details such as specific times and tasks and the person responsible for specific tasks such as introducing the session, managing the chat, triggering polls, and setting up breakouts (sample virtual design sheet: Michael Fullan Enterprises).
- We would provide presenters with standard templates for their session designs. Given the deep involvement of the program team in the design of virtual Summit breakout sessions, we have created a few models and activity structures for virtual presentations (Activity Structure Models for Virtual Sessions Resource).

Detailed Timeline and Tasks for Live Sessions

On Tuesday, March 10 (three weeks prior to the Summit and a day after the decision was made to pivot to a virtual Summit), all Summit session presenters were notified via email about the transition to a virtual environment and asked to complete a survey regarding their interest to participate. Responses were due the following day, Wednesday, March 11, and an initial virtual program (which sessions would be presented live and which would be pre-recorded) was determined. In addition, the timeline and process to support session presenters, along with the Resource Guides and Presenter Virtual Host FAQs, were also developed that week.

On Tuesday, March 17 (14 days prior to the Summit), the Resource Guide for Live Zoom Sessions was sent to all live-session presenters with the following requests:

By Wednesday, March 18 (13 days prior to the Summit)

- Review the Resource Guide and confirm agreement to present live via Zoom.
- Provide their familiarity with online teaching using the Zoom platform and tools.
- Provide which of the eight possible virtual session dates/times did NOT work for them.

By Friday, March 20 (11 days prior to the Summit)

- Submit a revised design sheet (to include revised session title, description, and/or presenters, if applicable) for the virtual session that detailed the Zoom functionalities they planned to use, as well as a maximum capacity for the session.
- Schedule a 30-minute Zoom Design/Technical appointment (via YouCanBook.me) to test their equipment and internet connection and review the revised session design and Zoom tools to be used.

By the following Wednesday, March 25 (Six days prior to the Summit)

- Submit their session slides (and any other handouts) via the Summit presenter upload portal so that Carnegie staff could upload PDF versions into the mobile app for attendees.
- Complete the presenter consent and release legal form.

During the week of March 23 (One week prior to the Summit)

- All 40+ Zoom Design/Technical calls took place.
- The virtual Summit session schedule was finalized and shared with all session presenters. This work required avoiding topic and presenter conflicts (especially since Carnegie staff were in multiple sessions) and managing presenter schedule requests. Session monitor assignments (both on-site and virtual) were also finalized.
- Six new Zoom accounts were used to create the live Zoom links for each session. Session monitors were added as alternate Zoom hosts to give them additional Zoom functionality privileges.
- Outlook calendar invites with the specific Zoom link were emailed to all presenters and Carnegie session monitors involved in each live session. As a reminder, a secondary "Session Setup" calendar invite was emailed 15 minutes prior to the start time for every virtual session.
- Calendar invite details included (1) the specific Zoom account used and (2) the main and backup session monitors. These detailed calendar invites provided a reliable resource that reduced the need (and likely technical access requests) for presenters and session monitors to access their live-session Zoom links via the mobile app.
- The same Zoom links were also added to each live-session description in the mobile app. Attendees would access the breakout sessions via these links.
- Sessions were clearly tagged, including breakout sessions, to best manage the expectations of attendees.

During the week of March 31 (Summit week)

- Eight sets of live sessions, each with five to six concurrent sessions, took place over the three days.
- Zoom technical support staff were continually monitoring all Zoom sessions via their administrative access view, in addition to the MS Teams Session Monitor channels set up specifically for tech support. Most of the technical issues experienced involved Zoom malfunctions (videos not playing, polls not functioning, chat features disabled, etc.).
- Session monitors (both main and backup) played key roles in supporting presenters (AV checks, slide sharing, troubleshooting last-minute issues, responding to attendees in the chat, recording the sessions, communicating with IT, attending to the waiting room, enacting breakout rooms, and posting polls).
- As each live session concluded, we pulled the Zoom mp4 video recording and chat log from each Zoom account and saved them to Dropbox. Session monitors completed a survey with any important notes that would affect the processing of the session recording (e.g., technology challenges or downtime). The video processing team followed a standard work protocol:
    - Export the mp4 into iMovie.
    - Review the session monitor's notes regarding the recording.
    - Trim the front and back of the recording, plus anything of significance needed.
    - Upload into Vimeo.
    - Add thumbnail/static image of Carnegie session title slide to its landing page.
    - Add session title, description, and presenters to the landing page.

Detailed Timeline and Tasks for Pre-Recorded Sessions

On Wednesday, March 18 (13 days prior to the Summit), the Resource Guide for Pre-Recorded On-Demand Zoom Sessions was sent to all prerecorded session presenters with the following requests:

By Thursday, March 19 (12 days prior to the Summit)

- Review the Resource Guide and confirm their agreement to pre-record their session via Zoom.
- Confirm all presenters participating in the pre-recorded session.

By the following Wednesday, March 25 (six days prior to the Summit)

- Test their Zoom functionality and reach out with any issues.
- Record their presentation on Zoom.
- Submit via the Summit presenter upload portal:
    - Mp4 Zoom recording
    - Revised session title, description, and/or presenters (if applicable)
    - Session slides (and any other handouts) for Carnegie staff to upload PDF versions into the Summit mobile app
- Complete the presenter consent and release legal form.

Within the mobile app, each session had a title, description, and list of presenters. As session slides and materials came in, we immediately converted everything to PDFs and uploaded them into the mobile app so that they could be accessed by attendees. Once the video processing team processed each recording (most often within 24 hours), the specific Vimeo link was also added to each pre-recorded session's description in the mobile app.

In order to give the pre-recorded sessions more visibility, they were "scheduled" within each of the live breakout session sets. This provided attendees with an opportunity to select from five to six live sessions and two to three on-demand sessions within any given time slot.

Supporting Poster Session Presenters

Our poster gallery, poster receptions, and scheduled poster viewing are critical elements of the in-person Summit. They provide an opportunity for networking and learning more deeply about improvement work.

Our aim was to re-create for the virtual event a poster presentation experience. Poster presenters already had the option of sharing a PDF version of their posters in the Summit mobile app. We surveyed our poster presenters to gather additional ideas on how to improve the virtual Summit poster experience and, as a result, introduced an opportunity for poster presenters to include a short two- to three-minute Zoom video recording. The Resource Guide for Pre-Recorded Sessions was quickly revised with detailed instructions for poster presenters to add a video if they would like, and a Resource Guide for Poster Zoom Presentations was created.

Prior to deciding to pivot to a virtual event, the Summit had confirmed 76 poster presentations. Of the 76 original on-site posters, 53 opted to participate in the virtual Summit poster experience and submitted PDFs of their posters. Of those 53, 22 submitted short Zoom video recordings. All PDFs and links to their processed recordings (hosted on Vimeo) were added to the poster's description in the mobile app.

In order to give posters more visibility, each morning included a “Coffee and Poster Viewing” session from 7:30 a.m. to 8:00 a.m. PT as a way to encourage attendees to check out the posters. Any poster that had an accompanying video was tagged with an “On-Demand Poster Session” tag within the mobile app as well.

The Role and Preparation of Session Monitors

While we have always engaged session monitors at the in-person Summit, the role of session monitors for the virtual event was new and critical. Session monitors needed to be rapidly assigned, trained, and prepared to support the virtual session presenters and attendees.

Week of March 16 (two weeks prior to the Summit)

- We reached out to Carnegie staff who had some experience with Zoom (and adequate at-home internet speed) to serve as session monitors. The goal was for each session to have one session monitor on-site at the Foundation (to ensure good internet bandwidth) and a second backup session monitor supporting the session from home.
- A session monitor training was held on Friday to orient all session monitors on what to expect during the planning calls the following week, as well as during the actual virtual Summit. A Virtual Session Monitor Guide and Session Monitor Checklist were developed to help prepare session monitors.

Week of March 23 (one week prior to the Summit)

- Session monitors joined all the Zoom Design/Technical calls. The idea to include a backup session monitor came early this week, so many were added to calls based on their availability.

Week of March 31 (Summit Week)

- Final check-in for session monitors was held on Monday to share final reminders and important information, including a Smartsheet schedule grid. This grid became a key resource for session monitors and program team members as the central repository of important information. An optional “extra practice” session was also available earlier that day.
- A 30-minute session monitor huddle was scheduled for the end of Wednesday and Thursday to discuss issues folks were experiencing.
- The MS Teams Session Monitors channel was created to facilitate communication and troubleshooting.
- Session monitors were asked to submit the following data regarding each session they participated in: the number of attendees, notes to help the video processing team (e.g., breakout rooms occurred about 30 minutes in, cut out the recorded portion where presenters are just chatting, etc.).

What would we do differently?

This role was new for us, so now that we have had the experience, we would provide a formal training (versus ad hoc training) for session monitors.

Communications (Email, Website, Social Media)

Email Communications

At the time that we needed to shift from an in-person conference to a virtual experience, we had about two weeks left in our email marketing campaign and our attendee logistics emails that help them prepare and navigate the in-person event. In order to shift to a virtual event, we had to review and adjust our communications plan by:

- pausing all current planned communications while we planned what a virtual experience could look like;
- creating immediate communications to currently registered attendees to inform them of our thinking along the way; and
- planning our virtual event communications strategy.

Immediate Communications

As we explored the possibility of a virtual event, we knew it was important to communicate to current registrants. Many had already been contacting us and asking about the status of the event and if there were any plans to update our refunds and cancellations policy. While we did not immediately have all the decisions and details ready for a public announcement, it was important for us to keep our community informed with email communications every two to three days. Our goal was to acknowledge our unprecedented situation, provide answers to questions, and be transparent about what we were continuing to explore.

Virtual Summit Communication Plan

Following the decision to cancel the in-person event and convene virtually, we developed a new communications strategy and timeline with the goals of marketing our new virtual event and engaging our (now virtual) attendees with event information and logistics. Given that the event was virtual and did not require travel and accommodations, we were able to continue marketing the event and registering people up until the start of the Summit.

To provide answers to attendees' potential questions and issues before and during the event, we pivoted to more frequent informational emails, which were designed to function as on-site ambassadors. Attendee emails focused on the following communications:

- An announcement of the virtual Summit and our Pay What You Will Model
- An announcement of the agenda
- A "know before you go" to prepare for the virtual experience
- An email thanking our sponsors for their continued support and guidance
- The event kickoff with the first keynote
- Daily program emails
- Thank-you emails

Website

Due to the shift of our annual Summit from an in-person to virtual experience, our Summit website needed to be updated frequently to reflect all changes in the schedule, program, and format of the event. An up-to-date website was crucial in our communication efforts with Summit attendees, our mailing list, and online audiences. While we were working on the decisions and details of the virtual

Summit internally, our goal was to acknowledge the unprecedented situation, provide accurate information as it became available, and be transparent about our decisions.

We changed our website strategy from years past as we had to shut down and then re-open registration, provide new announcements from our President about the shift to the online event, and update every page as soon as we received new information from the Summit leadership team. This required a full audit of our Summit-related webpages and constant refreshes as decisions were made to re-open and reduce the registration price, provide a “Pay What You Will” option for attendees that registered for the in-person conference, and explain what the virtual event would look like and how registrants would access live and pre-recorded sessions.

In order to complete all of these revisions in the three weeks leading up to the virtual Summit, the Educative Communications team had to document all website changes. We also held frequent meetings with the Summit leadership team to ensure that the website reflected the most current information, such as the number of live and pre-recorded sessions, the revised schedule, and the new registration options. Since we were able to keep registration open right until the start of the Summit, we had to design our website for two audiences – attendees and potential attendees. Thus, we had to carefully craft our webpages from strictly a user perspective for both audiences in order to make sure that attendees were able to easily find information about accessing the web platform and prepare for using Zoom, while also situating registration information and program details in plain view for potential new registrants.

Importantly, all of our changes on the website informed our email marketing and social media efforts. It was essential that our website was up to date for our external audiences and internal communications. For instance, when we posted new announcements from our President and updated registration information and FAQs on our website, we shared these externally on our social media platforms and in our email marketing campaign as well. This ensured that all of our external communications were informative and cohesive.

Lastly, after the virtual Summit, we had to complete another major update to the website to signal that the live Summit had happened in the past and to market the 2020 Summit Digital Library. This required a total rehaul of our Summit webpages and additional meetings between the Summit Leadership and Communications teams to ensure that the website told our story of transitioning from the in-person to virtual event to digital library resource. Overall, our website required a continuous level of engagement from our Communications team to ensure that it was responsive to new decisions and transitions in order provide accurate information externally and to inform our social media and email marketing campaigns.

Social Media

In light of the transformation of the 2020 Summit from an in-person to virtual event, our social media strategy changed in order to engage our online audience in the virtual Summit and capture the excitement of our attendees. To do this, we invested in live tweeting two to three high-priority sessions per set and each keynote presentation on Twitter.

This required creating a detailed social media schedule with pre-written and scheduled posts per day. Additionally, we advertised our social media accounts on all email communications to attendees, within the Summit web platform and mobile app, and on every standard session introduction slide. We also invited 2020 Summit attendees to follow our social media accounts on Twitter, Facebook, and LinkedIn to stay in touch and receive updates and to share their own posts using our event hashtag of

#CarnegieSummit2020. Lastly, we invited attendees to join our Continuous Improvement in Education LinkedIn Group for more substantive conversations throughout the year.

This flurry of activity, coupled with the amount of retweeted posts that mentioned our event hashtag, led to positive results on our Twitter feed in terms of post reach and engagement. For example, throughout the 7-day period from March 29 to April 4, 61,600 people saw our tweets as opposed to 40,000 for Summit 2019 during the period of April 13–19, 2019.

Most telling, our engagement rate—the number of engagements (clicks, retweets, follows, replies, likes) divided by the total number of viewers (i.e., out of everyone who saw the tweet, what percentage actually did something with it?)—was 2.1% for Summit 2020 versus 1.1% for Summit 2019. We also added 122 followers during this time period to our Twitter feed and 20 to our LinkedIn page, and more than 30 attendees joined our Continuous Improvement in Education LinkedIn group.

Our 2020 Summit Digital Library

"I love the idea of learning at my pace by viewing on-demand videos and pausing for notes, writing, thinking, etc." — 2020 Virtual Summit Attendee

At the close of the virtual Summit, we had the following:

- Over 90 hours of content organized into four program strands—Methods of Improvement Science and Networks, Improvement Science in Practice, Improvement Networks in Practice, and Leadership for Improvement—and covering seven areas of focus: Data & Measurement, Educator Development, Equity & Achievement Gaps, Higher Education, Improvement Capability, Instruction & Assessment, and Spread & Scale
- 42 live recorded video sessions, 25 prerecorded video sessions, and 53 posters, including 22 poster video sessions
- Slides, resources, and tools created by session presenters
- Keynote presentations by Carnegie President Anthony Bryk; Francesca Gino, author of *Rebel Talent*; and John B. Diamond and Amanda E. Lewis, co-authors of *Despite the Best Intentions: How Racial Inequality Thrives in Good Schools*

We made this resource available as a digital library with 24/7 viewing for all registered attendees on the same 2020 Summit web platform and mobile app that were used for the virtual event. We also extended a subscription for the 2020 Summit Digital Library at a small fee for those who were unable to attend the virtual event.

Linked Resources

Live Sessions

Resource Guide for Live Sessions

Zoom instructional slides

Presenter Virtual Hosting FAQ

Activity Structure Models for Virtual Sessions Resource

Michael Fullan Enterprises Virtual Session Design Sheet

Pre-Recorded Sessions

Resource Guide for Pre-Recorded Sessions

Poster Sessions

Resource Guide for Poster Zoom Presentations

Session Monitors

Virtual session monitor guide

Session monitor checklist

Final check-in

Smartsheet schedule grid