Presenting Sponsor: Blackbaud

Going Virtual: AFP ICON Transition to an Online Conference – March 2020

"It was an amazing experience. I was able to take immediate practices back to my nonprofit and I learned something new at every session."
AFP ICON VIRTUAL Attendee

Background

Each year, the Association of Fundraising Professionals (AFP) Global hosts approximately 3,400 attendees at the premier fundraising professional development event, AFP ICON. During this event, AFP hosts between 150-200 speakers to facilitate over 100 different educational sessions and more than 125 exhibitors and sponsors. Beyond education, professional development and access to cutting-edge technologies and services with our exhibitors and partners, ICON attendees highly value the ability to connect and network with fellow fundraisers in numerous intimate environments throughout a three-day conference. The 2020 conference was scheduled to take place March 29-31 in Baltimore.

Executive Summary

Five weeks prior to the start of AFP ICON in Baltimore, AFP became concerned about the impending global pandemic of COVID-19 and its impact on AFP ICON. As such, AFP began planning a supplemental virtual option for attendees. Once the pandemic hit the United States, it became apparent that AFP ICON needed to shift to a completely online experience. AFP staff worked with attendees, speakers, exhibitors, sponsors and vendors to successfully transition the conference to an online platform over the same three days. In the end, nearly 1,000 attendees heard from top-tier speakers, engaged with valuable sponsors and exhibitors, and networked with fellow attendees over the same three days of the original in-person conference in what was an extremely successful AFP ICON VIRTUAL event.

Introduction

The experience that AFP had reflects specific timelines and leadership styles that may not work for all situations. Through this experience we learned not only about how to host a successful virtual event, but about leadership, teamwork and agility. Throughout this case study we have highlighted the most important decisions that contributed to our own success with "IMPORTANT DECISION."

Reading the Tea Leaves

In mid-February, the thought that COVID-19 would impact the United States seemed likely. With that in mind, we began exploring what it would look like to offer all or part of AFP ICON virtually. This exploration resulted in our plan to launch a one-day option of AFP ICON online.

As our team continued to plan for ICON in Baltimore and our one-day virtual experience, the situation with COVID-19 continued to take hold in the United States, with the first three cases in Maryland announced on March 5. Our team continued discussions and, with attendees health and possible organizational travel restrictions being put in place, decided to offer a full online virtual conference alongside the event in Baltimore. By March 12, gatherings of more than 250 people were banned in Maryland and our team decided to fully transition AFP ICON in-person to AFP ICON VIRTUAL, held March 29-31.

Sorting Out Technology

Before we knew AFP ICON VIRTUAL would be our main event, we started the decision-making process on technology and production of our virtual event. With limited time, we quickly moved to ensure our vendors, BlueSky (learning management system) and Freeman (audio/visual), were able to work alongside each other. Luck was on our side as the two vendors worked together in the past. BlueSky would be responsible for tech support, the streaming platform, registration and attendee Q&A while Freeman would serve as technical and production directors and manage audio and visual. It was important for us to identify vendors who had some level of redundancies/duplication so where appropriate, we could maximize the success of the event and minimize any potential disruptions.

Simultaneously, we reconstructed our conference app, through DoubleDutch, to serve our virtual conference.

Preparing a Program

As we developed the schedule, we felt it was important to keep the virtual experience as close to the in-person experience as possible, while considering the constraints of not physically being together in one location. With that, it was decided that we would run three educational sessions on Sunday from 10:00 a.m. – 3:30 p.m. and four educational sessions both Monday and Tuesday from 10:00 a.m. – 5:30 p.m.

IMPORTANT DECISION: While we had a lot of discussion about having multiple tracks, our time was short, so we decided to focus on one strong track that would cover a diverse range of content. With that in mind, we selected session topics that would appeal to a broad audience and stayed away from niche topics. While we had already identified speakers who had engaging presentation styles, it was important that we selected speakers who could seamlessly transition the content to the virtual experience, and who represented diverse communities, backgrounds and experiences, including visual and non-visual diversity.

IMPORTANT DECISION: One of the most important decisions was to add interesting and useful content between sessions. Otherwise, we were just presenting a series of webinars or educational sessions. So, we took stock of who would have been honored at the conference, and using the virtual conference as a way to honor them, had respected fundraisers like Bob Carter and Kay Sprinkel Grace give interviews. These turned out to be valuable ways to share additional content and perspectives from fundraising experts and gave the conference a more human feel. These in-between sessions were also an opportunity to promote AFP programs, products and groups, such as the AFP Foundations for Philanthropy, our Emerging Leaders program and others.

In building out the program, we took advantage of the opportunity to weave in condensed AFP-related content between sessions, such as micro-learning videos and information related to the AFP Foundations for Philanthropy. Attendees appreciated the break from back-to-back sessions and AFP was also able to highlight more of our important work to our members and nonmembers.

AFP ICON serves as a main event for the AFP Foundations for Philanthropy and we took that into consideration as we built our program. The AFP Foundations for Philanthropy's primary concern was that our annual fund's (BE the CAUSE/Every Member Campaign in Canada) kickoff event for the year relies on ICON attendees and marketing to generate donations. The Foundations also utilize the event for stewardship opportunities and donor recognition as important touchpoints for the year. We continued to promote our BE the CAUSE and Every Member Campaign by having our emcee and board chairs from our association and foundation discuss the gift-matching program with Blackbaud during their live interviews. We also utilized the conference app to encourage giving from attendees. We acted similarly to how we would for our in-person conference, sending emails to AFP chapters and members to solicit gifts. Instead of a donor reception, we created an email to be sent to donors for stewardship. We included thank you videos from our board chairs and AFP's president and CEO. The matching program for BE the CAUSE and Every Member Campaign reached 74 percent of what we raised during the 2019 in-person event, which we were extremely pleased with. Overall, we were happy to build in a great deal of content that drove gifts toward the AFP Foundations for Philanthropy's mission.

The Secret Sauce

IMPORTANT DECISION: As we moved along in the planning process, we knew we needed a way to keep the content connected and flowing, and we realized that would require a strong host/presenter/speaker who could keep the program going, especially if there were technical issues. One AFP member, volunteer and past board member, Alice Ferris, CFRE, ACFRE has done radio broadcasts and telethons on television, and seemed a perfect candidate. This move turned out to be beneficial to us all since Alice had existing relationships with many of the presenters, which made the transitions and back and forth that much more natural. Attendees shared the same sentiment and enjoyed the camaraderie that Alice helped to build with our attendees.

Speaker Preparation

It was important for us to have consistent presentations from our speakers.
IMPORTANT DECISION: We provided all speakers with the same high-quality equipment (microphone and webcam) to ensure consistency in audio and visual presentation. All speakers were given tips on how to adapt in-person presentations to virtual to ensure interactivity with participants. In the same vein, tips to speakers on lighting and background to create a visually appealing scene and minimize distractions for participants were provided.

IMPORTANT DECISION: We scheduled time in advance for each speaker to test their access to the virtual platform to ensure everything worked and to troubleshoot problems. AFP provided two opportunities to test equipment, which also allowed speakers to engage with each other and promoted a sense of community. Lastly, we scheduled a final check-in call 48 hours prior to the start of the virtual event to answer last minute questions. That check-in included a review of the schedule; a discussion on how questions and answers would be handled; and an opportunity for AFP leadership to thank the speakers in advance, wish them well and encourage them to have fun.

Exhibitors and Sponsors

While our focus was on our attendee experience, we wanted to ensure that our exhibitors and sponsors were able to participate in AFP ICON VIRTUAL as well.

IMPORTANT DECISION: We connected with sponsors in specific partnership tiers and offered them the opportunity to air a 30-second video or voiceover commercial so attendees still had access to these organizations' services or products. For our presenting sponsor, Blackbaud, we prerecorded a welcome video to kick off the conference. This also added to the in-person feel of our virtual event.

All sponsors and exhibitors were showcased on rolling slides multiple times during the conference and were given access to the conference app. We encouraged these partners to use the app to connect and engage with attendees during the conference.

Planning for Uncertainty

One of the most challenging parts of pulling together AFP ICON VIRTUAL was the level of uncertainty we constantly dealt with, both with COVID-19 and in never having produced a virtual event to this magnitude in such a short time frame. Many of the decisions we made were safeguards, while others were designed to keep each individual focused on executing their respective part of the conference.

IMPORTANT DECISION: Two weeks before the event, we started to ask staff, our vendors and our speakers: "What and how could this go wrong?" This important question directed our team to wrap our heads around where we needed to add in redundancies, have backup plans or execute parts of the event in different ways.

At one point, we planned to bring all our speakers into one central location and conduct a live recording. We soon realized the risk and level of uncertainty that surrounded that option was too high and opted to have each person present from their homes. It was important that we decided this quickly as it influenced several additional decisions that needed to be made.

One of our greatest concerns was the failure of technology. We asked our speakers to prerecord their sessions in the event that they were unable to present, lost internet or had a computer failure. This way, we would still have the content and be ready to substitute the recorded version in. All our speakers were also asked to have only the computer they were presenting from connected to the internet to minimize internet interruptions. These backup plans provided a level of comfort and confidence during the actual event. Fortunately, we did not have to use any of these backups.

IMPORTANT DECISION: As soon as we understood that ICON VIRTUAL would be our only event, we convened a group called the ICON Success Council. The ICON Success Council included our senior leadership team as well as staff who were highly engaged in executing ICON VIRTUAL. Our group met twice a day at 10:00 a.m. and 4:00 p.m. This was crucial to our success as it assured that we stayed on task and kept each other in the loop for important decisions that needed to be made. This also created a sense of team unity, which given the circumstances, was vitally important.

During the event, the ICON Success Council met at the end of each day to assess and adjust based on that day's experience. Our ability to be agile and pivot, even during the event, helped our conference succeed.

Showtime!

As the dates for ICON VIRTUAL arrived, we felt as prepared as possible. Our fears about bandwidth and technology passed quickly as streams of our live event reached the homes of nearly 1,000 attendees. Our partners at BlueSky and Freeman had extra staff on hand and seamlessly delivered the live content that exceeded our expectations.

To moderate questions and answers from attendees, we used the online platform slido. Attendees submitted questions to speakers, which were then reviewed by our staff and made public for all attendees to see. Attendees could "vote up" specific questions which allowed our speakers to see what questions were most important to answer.

IMPORTANT DECISION: Conversations between attendees started immediately on our conference app, which proved to be one of the most valuable ways for individuals to network. Within the app, a great deal of community was created—from sharing pictures of "AFP Dogs" to providing book suggestions, which has since transformed into a book club. The conference app was also a launching pad for many small groups to host end-of-day happy hour debriefs and morning coffee chats. This was a reminder to us that while we can facilitate the networking portion of any type of conference, it is ultimately up to the attendees to engage with other conference-goers. Finally, we found that beyond networking, the sense of community that was created provided immense value in the conference experience.

The AFPeeps, AFP's unofficial ambassadors, hosted Facebook Live events at the end of each day that allowed viewers to join the conversation, give their thoughts on the day's program and decompress with a sense of community. These turned out to be quite successful and is something we will plan to build into future programs.

José Andrés was scheduled as our closing plenary keynote speaker at our in-person event. Because of his direct work with communities affected by COVID-19, having José as part of our program was a timely choice. We transitioned this keynote into a pre-recorded interview between Andrés and AFP President and CEO Mike Geiger, to be played at the end of our event. As part of our agreement with him, we will include a similar recording into an upcoming program as a follow up to the COVID-19 pandemic and his philanthropic efforts.

What We Learned

AFP ICON VIRTUAL was extremely successful and what we learned will influence what we adjust as we continue to deliver more virtual experiences.

One of our biggest takeaways is how we schedule a virtual event that will maximize our viewers' attention. Our post-event data showed that many of our attendees would max out their viewing between 4-5 hours. In the future, we will consider this and facilitate more networking or exhibitor engagement opportunities with the extra time. Additionally, while three days for the ICON in-person event is appropriate, three days of a virtual experience may be more than attendees are looking for.

Due to time constraints, we did not have multiple tracks for ICON VIRTUAL. However, we see the need to have various education tracks to give attendees the opportunity to attend sessions that are most meaningful to them. This will allow us to have more diversity with our speakers and programs and reach more audiences.

Given more time, we will research virtual exhibitor experiences and be creative in ways to bring our sponsors into the program in a more meaningful way.

Lastly, even though networking went well, going forward, we will facilitate more networking opportunities for attendees during virtual events. Participants shared that one of the biggest reasons they attend these events is for networking and we now know there are creative ways we can help to facilitate this with them.

AFP ICON VIRTUAL was a success. Attendees reported favorably that the event met and exceeded their expectations. We found it crucial to find vendor partners who had expertise and were able to help ask the questions we would otherwise not have thought of. Communication with all audiences and stakeholders was key to our success. Given more time and resources, we would have allowed for more options with breakout sessions; more thoughtfully engaged our sponsors and exhibitors; and increased AFP's role in facilitating networking and community building for attendees, sponsors and exhibitors.

<u>Key Takeaways and Tips</u>

<u>Pricing</u>

- Adjust pricing for the virtual events but assure that it is still a reasonable price, considering the value of your programs and content.
- Record the event and give attendees unlimited post-event access, which carries additional value.
- Offer tiered pricing for specific groups of members to make it accessible.

<u>Program</u>

- Select an engaging host who is familiar to your audience. This person will help tie the entire program together and provide a level of consistency.
- Have you program run 4-5 hours per day to adjust for attendees' attention spans.
- Variety is important. Beyond educational programs, add live interviews, commercials from sponsors, exhibitor recognition and other short prerecorded content to break up programing.
- Identify a strong question-and-answer platform and know how to manage it.

<u>Speakers</u>

- Select session topics that would have interest to the broadest possible audience, especially if you are only doing one track.
- Select speakers who will translate well to a virtual platform and are able engage attendees in this new format.
- Provide tips to speakers on how to adapt in-person presentations to virtual to ensure interactivity with participants.
- Provide speakers with the same high-quality equipment (microphone and webcam) to ensure consistency in audio and visual presentation.
- Schedule pre-event check-ins for speakers to test equipment, familiarize themselves with the platform and ask questions of staff and vendors.
- Consider including an opening and closing keynote speaker with an inspirational message.

<u>Sponsors and Exhibitors</u>

- Offer 30-second commercials or 30-second voiceovers for sponsor recognition.
- Recognize exhibitors and sponsors multiple times a day through rotating slides.
- Encourage exhibitors and sponsors to use the conference app to engage with attendees.
- Use the conference app to highlight sponsors and their content.
- Explore virtual exhibit halls to increase engagement with attendees.

Networking

- Use a conference app that allows attendees to connect with each other.
- Schedule time for networking into your program.
- Let organic networking happen. Attendees are eager to make this happen and will find many ways to connect with fellow attendees.

Communication

- Over-communicate with your attendees. These events are new to them and they need to feel comfortable as they log in to the event.
- Be transparent with all your attendees and stakeholders, especially if you need to change existing in-person conferences.
- Consistent communication with speakers and vendors throughout the run-up to the event is critical.

Technology

- Trust your vendors as the experts and listen to their advice whenever you are able.
- Engage in scenario-planning throughout the process to come up with solutions to as many potential problems as possible.
- To minimize possible internet disruptions for presenters, encourage them to have any other members of their household to NOT use devices that require the internet during their live presentation.
- Be clear with vendor(s) about expectations and decision-making processes.
- Build in redundancies/duplication between vendors, where appropriate, to maximize the success of the event and minimize any potential disruptions.

Staffing/Internal Processes

- Have one lead on production and one lead on the program. They work together but have a great deal of variance between them.
- Develop an internal project team to manage the effort, including weekly meetings that shift to daily meetings as the virtual event approaches.
- Use an internal communication tool that allows for project management and oversight with all parties.
- Assure all staff and volunteers know their roles and create a list of FAQs to guide them during the event.

Areas for Improvement and Consideration

- Explore opportunities for virtual exhibit halls to better connect our exhibitors and attendees.
- Outline more sponsor recognition opportunities. Virtual conferences lend themselves to unique forms of sponsorship packages.
- Explore breakout rooms to allow for multiple coinciding tracks of the program. A "chose your schedule" program could work with more time given to plan.
- Have consistent times for each day of an event. In our case, 4-5 hours per day over two days is the ideal length.
- Include both opening and closing speakers—this is important to maintain the "conference feel."
- Expand your reach. The opportunities with a virtual conference allow for many people to participate that otherwise would not be able to.
- Create a dedicated time and space for networking to happen. Even if we didn't facilitate the platform, allowing space for networking could serve as a facilitator itself.

Resources and Vendors

- **BlueSky eLearn** – Learning Management System (LMS)/eLearning partner
  - Responsibilities: Tech support, streaming platform, registration, attendee Q&A
- **Freeman** – Audio/Visual partner
  - Responsibilities: Production, technical directors and audio/visual
- **DoubleDutch** – Conference app partner
- **slido** – Audience interactions, attendee Q&A

AFP ICON VIRTUAL Sponsors

Blackbaud | DonorPerfect | Golfstatus | Neon One | CCS Fundraising | iWave Information Systems | Virtuous Software | OneCause | Tiltify | Appeal Maker | CauseVid | EveryAction | Funraise | Give Lively | iDonate | Pursuant | Tectonic Video | Streamworks | Nonprofit Quarterly | Nonprofit Times | The Chronicle of Philanthropy

"Even if AFP decided to return to a live format next year, I would still pay for an additional mini-conference if it was virtual. I thought the organization did a stellar job pivoting and communicating in light of all the challenges. I came away with much more useable information than I anticipated."
AFP ICON Virtual attendee

For more information on AFP or to become an AFP member, please visit www.afpglobal.org/join.