The start of a new year always prompts us to reflect on the most significant take-aways from the year. The Top 10 songs of 2020. The Top 10 Zoom backgrounds of 2020. The Top 10 reasons we are glad to say, "Goodbye, 2020!"

We anticipate that virtual meetings will still be the norm for the foreseeable future. And so, with two successful TechHire Virtual Institutes under our belt, we want to pause and reflect on the Top 10 take-aways for planning your own virtual institute.

1. ***Consider what you hope to accomplish by convening your partners and decide whether a virtual institute is the best approach to achieve those goals***. All virtual meetings — like webinars and conference calls — can help you and your partners share valuable information, understand challenges, devise strategies to achieve shared goals, and build rapport and relationships that make collaboration and informal information exchanges easier. A virtual institute is a longer learning series involving collaborative smaller sessions that build on a central theme. This approach allows for a deeper dive into your policy, planning, and implementation efforts; and time for teams to ask questions, reflect, and then discuss and apply learning to future sessions within the institute. It creates opportunities to break down silos: institutional silos as partners present their work and troubleshoot together in real time, and functional silos as full teams from leadership to front line staff work together to better connect policy and operations.

2. ***Begin planning at least three to six months in advance with the formation of a planning team that includes your partners.*** A collaborative planning process will ensure the timing and topics work for all and enhance buy-in and participation. A project lead or set of co-leads is critical for organizing the work of the planning team.

3. ***Develop your vision for the overall institute, then build the structure.*** Start with the overall purpose (*what challenges do you need to address?)* and end goals (w*hat do you want participants to walk away with after the event?).* Then work from these goals to identify the topics you want to cover, how many sessions you will need, how the sessions connect to and build on one another, and how each session will contribute to the larger end goals. Be sure to capture this overarching vision and planned flow in notes or a spreadsheet that can be shared; this helps make sure that everyone is on the same page and gives the planning team something to refer back to throughout the planning process to ensure everyone stays focused on the goals.

4. ***Design your Virtual Institute with a mix of workshops for the entire group and breakout rooms or concurrent smaller group sessions***. Larger workshops provide an opportunity for consistent messaging and learning across all partners and staff. These should include an opening session and a closing session; the opening should set the stage for what folks can expect, and the closing should provide a sense of progress made and clear next steps. Smaller breakouts allow people to see each other's faces and to engage more actively in the discussion; this helps facilitate informal interactions and relationships that make future collaboration easier. Breakouts are perfect for collaborating, brainstorming, and bringing ideas back to the larger group for fuller

review and input. Concurrent small sessions can also allow participants to work on issues most directly related to their work.

5. ***Tend to the logistical details.*** Find a shared virtual space you can use to house all event materials so anyone on the planning team can access them (SharePoint, Google Doc, Dropbox, etc.). For the Virtual Institute itself, identify a meeting platform that is widely used by your partners and/or easy to navigate. Put together a complete invitation list and identify someone who can be responsible for managing that list and sending out meeting notices as soon as possible to get dates on people's calendars. When putting together the invitation list, consider inviting frontline staff and external partners that do not always get to attend conferences; they bring a lot of practical knowledge and valuable insights. Create a project plan that clearly identifies each step, who is responsible, any deliverables, and due dates; then use this plan to drive your planning meeting agendas and check in on progress.

6. ***Design engaging workshops***. Assign a leader for each session to plan it, invite speakers, coordinate a pre-call with speakers, ensure the PowerPoint and other materials are completed on time, and (optimally) facilitate the session. Have a tech savvy person to help run and troubleshoot each session through dry-runs and the live event. Identify presenters who are both knowledgeable and good communicators to help make learning interesting, and clearly communicate your expectations on what to share, how much time they have, when you need draft materials, etc. As you structure the agendas, make sure to incorporate some form of audience participation, such as asking for input using chats or audio or polls, or opening up for questions and answers, or moving participants into breakout rooms for a time of discussion. Create an assignment or food for thought that connects from this session to the next one they will be attending. Consider including a team activity or homework for partners from the same agency to complete in between sessions.

7. ***Create common tools to be used throughout the Institute.*** Develop a common **planning sheet** that each session lead completes, which includes a breakdown of the timing for each session, questions to be asked, a synopsis of each presenter's comments, time for Q&A, deadline for PowerPoint completion; and a description of how this session connects to other sessions and the larger theme for the institute. A **PowerPoint template** will give consistency throughout the Virtual Institute and save time for speakers and sessions leads when it comes time to finalize materials. A **feedback tool, survey, or poll** will help you gather feedback between sessions so you can adjust as you go and improve the Institute for next time.

8. ***A few days before the start, send your participants a reminder.*** This sets expectations and addresses common questions like "Will I be on camera? What should I wear? When and how will I be participating in discussions? How do I connect to the meeting platform and use the features? Who do I contact if I run into technical difficulties?" Share the attendee list to build interest and to help folks connect before, during, or after the event.

9. ***When the Institute begins, be ready for bumps and plan to adjust.*** Something will not work as planned, like a speaker may become unavailable and the session leader may need to find a backup. If you can, convene the planning team and key leaders for a short debrief at the end of each day. This will help you share notes; respond to any input, glitches, and unforeseen issues; and adjust, if needed, to the remaining sessions.

10. ***Follow up after completion of the Institute.*** Post all the organizers' materials on the shared planning site and the participant materials on the meeting site. Send a follow up email thanking the participants, providing links to all the materials, and reminding folks of next steps. Workshop leads or a key leader should send thank you notes to the presenters and to everyone on the planning team. Debrief with your planning team about lessons learned and next steps. And do not forget to celebrate and show appreciation for everyone's hard work!

A virtual institute is not right for every group and every event, but it is a solution that can springboard planning, training, and continuous improvement activities at a time when we need to adapt rapidly to change without the benefit of in-person convenings.

For more information relevant to H-1B TechHire virtual events and materials, please visit the following pages:
Toast to TechHire: Four Years of Tech-Focused Job Training
This page includes relevant post-event material from TechHire's December 2020 Toast to TechHire event, including the event's Power Point presentations and MURAL boards.

H-1B TechHire 2019 Virtual Institute
This page includes materials from TechHire's 2019 Virtual Institute, including Power Point presentations and materials from key sessions.

TechHire Virtual and Remote Learning Resources
This page includes Peer Learning Group (PLG) call summaries and blog posts on topics related to remote participant support, online transitions, and general virtual support.