

From São Paulo to Zoom: Advice for Hosting a Virtual History of Cartography Symposium

by Jordana Dym and Denise A S Moura

The formula for international history of cartography conferences has been well established by events such as the International Conference of the History of Cartography (IHC), ICA Commission on the History of Cartography, and Simposio Iberoamericano de la Historia de la Cartografía (SIAHC): scholars assemble in a big city for a few days of academic activities—keynote and plenary sessions, twenty-minute talks, poster sessions—with book sales, exhibitions, and refreshment breaks that provide networking opportunities and an introduction to local treasures, flavors, and cultures. The model works, as attested to by the growing number of conferences and attendees, as well as by cross-border, interdisciplinary scholarly (and not so scholarly) collaborations following planned and serendipitous encounters.

In March 2020, the global pandemic unleashed by the coronavirus (COVID-19) upended this model, and specifically our plans to host the 5th biennial symposium of the International Society for the History of the Map (ISHMap) at the Biblioteca Mário de Andrade in São Paulo, Brazil. After discussion, and consulting participants, we chose to move forward virtually rather than cancelling. By April, ISHMap trustees approved a revised program, and on June 12–13, we hosted an event that engaged students, scholars, archivists, librarians, and collectors from across the globe. While we regret our lost physical encounter, a largely positive experience for organizers and participants leads us to share what we learned in adapting the in-person map history conference formula for a virtual gathering, in hopes of serving others who are considering hosting virtual or hybrid events and seek to reap some of the same benefits, notably a more inclusive, global audience and the opportunity to record and share many presentations.

ORIGINAL PLANNING

Since 2011, ISHMap has organized a small, free two-to-three-day symposium, principally although not exclusively for Society members, in even-numbered years. After attending a successful fourth symposium organized by then-Chair of Trustees Matthew Edney at the Osher Map Library and University of Southern Maine in 2018,

Denise Moura (Brazil) and 2019 Chair Jordana Dym (US) built on a joint project funded by São Paulo Research Foundation (FAPESP, proc.n. 18/20324–9) to propose hosting a 2020 event in São Paulo, Brazil and constituted an organizing committee of ISHMap Trustees Junia Furtado (Brazil), Carla Lois (Argentina), and Andréa Doré (Brazil) [Figure 1]. Although planning an in-person event, Committee members, based in and traveling through Brazil and Argentina, the Azores, Paris, and New York and connecting with equally-scattered Trustees and Society members, relied on technology from initial planning in July 2019 to facilitate remote collaboration. We worked with Google’s productivity products (Gmail, Slides, Documents, and Forms) to plan and store documents from meeting agendas to paper applications, and tapped ISHmap’s newly-established website and Twitter account and the newly-created H-Maps map history discussion network to advertise the call for papers (CFP).

By December 2019, things were looking good. A leading cultural studies scholar, Beatriz Jaguaribe (Universidade Federal do Rio de Janeiro, School of Communications, Brazil), signed on as keynote speaker and the CFP had yielded strong proposals from scholars working in Europe, the Americas, and Asia, with particularly strong Brazilian and South American participation. Panelists had proposed topics familiar in historical cartography as well as accepting the CFP’s invitation to “break boundaries” by seeking to tease out the “invisible” Afro-Brazilian impact on maps and landscapes, and sharing projects in map-based community activism. Moura’s tireless efforts established a collaboration with São Paulo’s Mário de Andrade Library (*Biblioteca Mário de Andrade*), the first and principal public library in a South American metropolis, as she vetted amphitheater, reception space and conference rooms, verified presentation technology, secured translation services for the keynote presentation, negotiated with caterers, and planned a small exhibition on São Paulo urban history with the Library’s curators to showcase its map collection. At the same time, a small team of students researched logistical and cultural information for participants. Focused on infrastructure and refreshments for approximately sixty

The screenshot displays a Google Sheet titled "ISHMap Symposium - Draft Program (April 10)". The spreadsheet content includes:

- Row 1: "SCHEDULE FOR 2 day ISHMAP SYMPOSIUM"
- Row 2: "June 11-12 (Thursday and Friday) or June 12-13, 2020 (Friday and Saturday) or June 14-15 (Saturday and Sunday)"
- Row 3: "Bookmark this page. All schedule updates, and live presentation links, will be posted here."
- Row 4: "For more information: <https://ishmap.wordpress.com>"
- Row 5: "Suggested social media hashtags: #ishmap2020."
- Row 6: "NOT INCLUDED: Pereira Prado, Degger, Morcrette, Vannieuwenhuyze; new book panel (here as 'interview with author' -- DM suggestion!)"
- Row 7: "TBD: Degger, Morcrette, Vannieuwenhuyze; (Maybes)"
- Row 8: "DAY 1"
- Row 10: "10:30-11:30"
- Row 11: "10:30 New York | 11:30 São Paulo | 15:30 London | 23:30 Tokyo"
- Row 12: "7:30 San Francisco | 9:30 Mexico City | 16:30 Paris/Berlin"
- Row 13: "Welcoming Remarks: Jordana Dym and Denise Moura"
- Row 14: "Keynote: Beatriz Jaguaribe"
- Row 15: "LINK:"
- Row 16: "ABSTRACT"
- Row 21: "12:00-1:45"
- Row 22: "12:00-12:45"

The Zoom interface shows a toolbar with options: Mute, Stop Video, Security, Participants (5), Polling, New Share, Pause Share, Annotate, Remote Control, and More. The meeting ID is 995-7897-2927. Video thumbnails for participants are visible on the right side of the screen.

Figure 1. The Organizing Committee discusses a revised program seen on a shared screen, April 18, 2020.

people, and anticipating many presenters and attendees from South America, we could not imagine that the unfolding of global history would lead from online planning meetings to a virtual event.

REIMAGINING VENUE: CHOOSING A DIGITAL PLATFORM

With the COVID-19 pandemic and the decision to convert an in-person symposium to a remote event, the infrastructure was reimagined for a digital venue. Hence, primary responsibility for hosting fell to ISHMap, including selecting a platform, as “local host” Denise Moura focused on training and participant experience. With access to a licensed Zoom account that did not limit time of online meetings and expanded attendee capacity, the Committee opted to host on this platform. Despite some security concerns (which the company over time appears to be addressing), the platform had advantages. Zoom featured online training materials in multiple languages (including Portuguese), built-in recording and transcription services, and (by June 2020) was familiar to many

academics. Most of all, the learning curve was not steep. When many US academic institutions transitioned from in-person to online teaching with a week’s notice, students and faculty were quickly able to become productive and reestablish effective communication. However, we knew success needed consideration of differences between online and presential in-person experience, and focused adjustments on maximizing engagement. In April and May, ISHMap Trustees and the Symposium Organizing Committee developed session protocols and participation etiquette guidelines based on our teaching experiences and symposium models by early adopters, including the March 2020 CUNY Human Sentence Processing Conference (<https://blogs.umass.edu/cuny2020/>) and April Culture Mapping 2020 (<https://newyorkscapes.org/event/culturemapping2020/>).

REIMAGINING FORMAT

When deciding to go online, we reexamined and reimagined the meeting’s format and timing. Significantly, we did not change the live nature of the event. In March, as



Figure 2. The Committee established the new meeting time using Time.is to compare time zones between San Francisco and Tokyo, the two farthest locations. Core sessions took place from early morning in the Americas to mid-evening in Europe, where most presenters were located.

we were debating whether to cancel the Symposium or move online, we surveyed the panelists not only about whether they would participate in a virtual meeting, but also what type of meeting they preferred. All but two opted to continue, and over half did not wish to pre-record presentations, despite expressing some concerns regarding internet bandwidth. So, in the most fundamental aspect, virtual ISHMap 2020 mirrored the in-person schedule, and we programmed only one pre-recorded session. Session structure also largely adopted the traditional format. Experts attending the conference acted as moderators who introduced the session and led discussion. Panelists gave talks, using a presentation software such as Powerpoint or Slides.

To go online, we did, however, revisit the daily meeting schedule in consideration of remote participation by presenters and participants. We started by imagining attendance from different time zones for a multi-hour or multi-day event and participating from home, in the context of personal or professional everyday commitments [Figure 2]. After reviewing participants' home time zones, we abbreviated the symposium in several ways: to two, not three, days; to fifteen-, not twenty-minute, presentations; and to seventy-five- instead of ninety-minute sessions. We shortened break times and added "book chats" as an optional activity to avoid people dispersing.

The slimmed-down program asked participants for online attention during six- rather than eight-hour days. But when to start and end those days? Most participants were based in the Americas and Europe, so we met from American morning to mid-afternoon and European mid-afternoon to late evening. This decision

was difficult, because we asked Asia-based participants to meet late at night; the few who participated understandably attended fewer sessions. The most important, effective adjustment to audience participation invited attendees to submit questions to presenters in writing using Zoom's chat feature; moderators selected, synthesized, and sometimes combined questions, allowing panelists to respond to multiple questions within a limited time frame.

REIMAGINING SESSIONS: ETIQUETTE AND TRAINING

Organizers increased communication with participants and added training before and during the meeting. Even more than with an in-person event, an online symposium required clear, consistent communication with participants, clear guidelines for session etiquette, particularly question-and-answer periods, and the recruitment, training, and collaboration of volunteer moderators and secretaries. For ISHMap 2020, the Organizing Committee and Trustees assumed that we needed to prepare everyone as if they had never attended or presented maps at an online webinar. To that end, we first developed manuals and tips for participants on attending and presenting virtually, including guidance on using the presentation platform to ensure maps were legible and talks were audible. We updated the program to reflect time zones on three continents. We also developed a virtual conference etiquette guide, program abstracts, and presenter bios; all were shared on ISHMap's website and used for slides with which moderators started each session.¹ The Committee also hosted an optional session to introduce speakers to the platform,



Figure 3. Secretary Training led by Denise Moura, June 1, 2020. Secretaries used session slides as backgrounds to improve visibility.

so individuals could test connectivity, audio, video, and presentation screen sharing, and troubleshoot problems in advance.

Most importantly for smooth running, the Committee realized that a virtual symposium would require additional staffing by people comfortable with videoconferencing technology to support organizers, panelists, and attendees during the event. Specifically, we needed to deploy many volunteer secretaries, not just the two we planned to recruit in São Paulo to help hosts with on-site registration and troubleshooting. For the virtual event, an expanded secretarial role included hosting and opening sessions to admit moderators and presenters to meet and test technology (audio, video, and screensharing); admitting only registered attendees; taking attendance; and troubleshooting problems on the fly. We assigned two secretaries as session co-hosts to share responsibilities and in case either experienced technical issues. To avoid cascading delays if sessions ran long and to ensure breaks, secretaries did not work back-to-back sessions. So,

we required, recruited, and trained a dozen Brazilian and US undergraduate and graduate students within a month of the event. After three weeks of virtual training, the secretaries had not only learned the platform but also had become a team [Figure 3]. Each practiced opening, hosting, and closing sessions; they communicated as a group in a messaging application (WhatsApp) for instant, easy international communication outside the event platform. Secretaries also attended optional pre-Symposium training sessions organized for presenters and for moderators recruited from ISHMap Trustees, Host Committee members, and established scholars—an unusual but productive gathering that built community, promoted unity and consistency across sessions, and contributed to sessions that both started and ended on time.

WHAT WENT WELL

Many things worked well. Communication between the Society and the Organizing Committee was smooth and continuous, facilitated by setting goals and everyone's



Figure 4. Example of a Session slide. This slide was visible as attendees entered a virtual room, so they could confirm their location, and (if desired) incorporate presenter names and paper titles into social media posts. The background, a map of São Paulo in 1930, honored the original symposium host city.

increasing experience with virtual meetings. We asked both what we wanted to deliver and how we expected individuals to experience the conference. We respected organizers' time, circulating planning meeting agendas in advance, which helped to structure conversation and to start and end in (mostly) timely fashion. Procedural manuals for session etiquette and functions for moderators, secretaries, and panelists, drafted by the ISHMap Chair and then vetted and modified by Trustees and Organizing Committee members, concentrated discussion and built a shared resource to anticipate challenges. Recruiting three secretaries from Skidmore College, which covered the Zoom license, ensured we could host multiple sessions at once, which maintained our goal of holding "site" costs to a minimum.² Organizers quickly agreed on the need to reopen conference registration, shorten both presentation and meeting times, reconfirm participant attendance, and solicit permission to record and later disseminate presentations.

We tested the platform and offered training to anyone who needed it. We created session slides to ensure

attendees knew what session they had joined, and background slides so secretaries were easily visible [Figure 4]. Working with a single provider's suite of productivity tools was also effective. Trading privacy for affordability and ease of use, we used Google: Gmail for Society Secretary, Treasurer, and Chair; Google Drive for files; Forms for surveys, registration, and paper proposals; Slides for meeting agendas and manuals. Other available platforms include Microsoft Teams, Asana, and others.

Our gamble on live presentations paid off. On the opening day, the event ran relatively smoothly, with sessions starting and ending on time, presenters displaying legible maps, and secretaries troubleshooting and resolving minor challenges [Figure 5]. Only one person experienced technological issues (and later re-recorded the presentation "for the record"). A post-conference survey of attendees, with over forty responses, was overwhelmingly encouraging. Society and non-Society members alike found attending easy, and live sessions more engaging than the few pre-recorded sessions. Most respondents recommended that ISHMap

organize future virtual as well as in-person encounters, particularly those without the resources to travel internationally or nationally to in-person events. Several respondents encouraged a return to slightly longer sessions, and permit live questions. Respondents still hope to attend in-person symposia, but would be excited to participate in online workshops.

Offering extensive training for session secretaries, as well as organizing pre-event training for session moderators and participants, in addition to establishing etiquette for sessions, paid off with sessions that ran smoothly, and reassured participants that there would be support as needed. Going forward, ISHMap will likely plan virtual, or remote, standalone events, and will explore adding virtual attendance and presentations to in-person gatherings.

More broadly, the online event increased the Society's visibility and interest in the participants' scholarship. With a few online and social media announcements [via our website (ishmap.wordpress.com), H-Net/H-Maps, Twitter, and Facebook], registration increased from the forty-fifty of past symposia to over 300, drawing in undergraduate as well as graduate students, and map history professionals from the Middle East and Asia, including

India and Indonesia, as well as throughout Europe (fourteen countries) and the Americas (fourteen countries). The virtual format substantially increased access and international participation due to the reduced financial and time demands.

Further, without onsite activities to organize, the Committee was able to innovate in a few key ways to engage this larger audience and acknowledge the risk-taking of participants. Adding a "best paper prize," we repurposed funds liberated from not paying for receptions and keynote translation to reward those who took a chance on a new format. We offered a certificate for attendees who were present for at least half the sessions on each day to reward attendance, not just registration; for live events, participation ranged from 150 attendees in plenaries to around sixty to seventy in most parallel sessions. Attendance suggests around 200 registrants took part. Hosting the conference virtually also allowed us to expand a single planned new book conversation to six thirty-minute "book chats"; authors and moderators, many leading international scholars who would not have attended in person, signed on with short notice. Presses offered discounts and requested to post recordings to their websites.

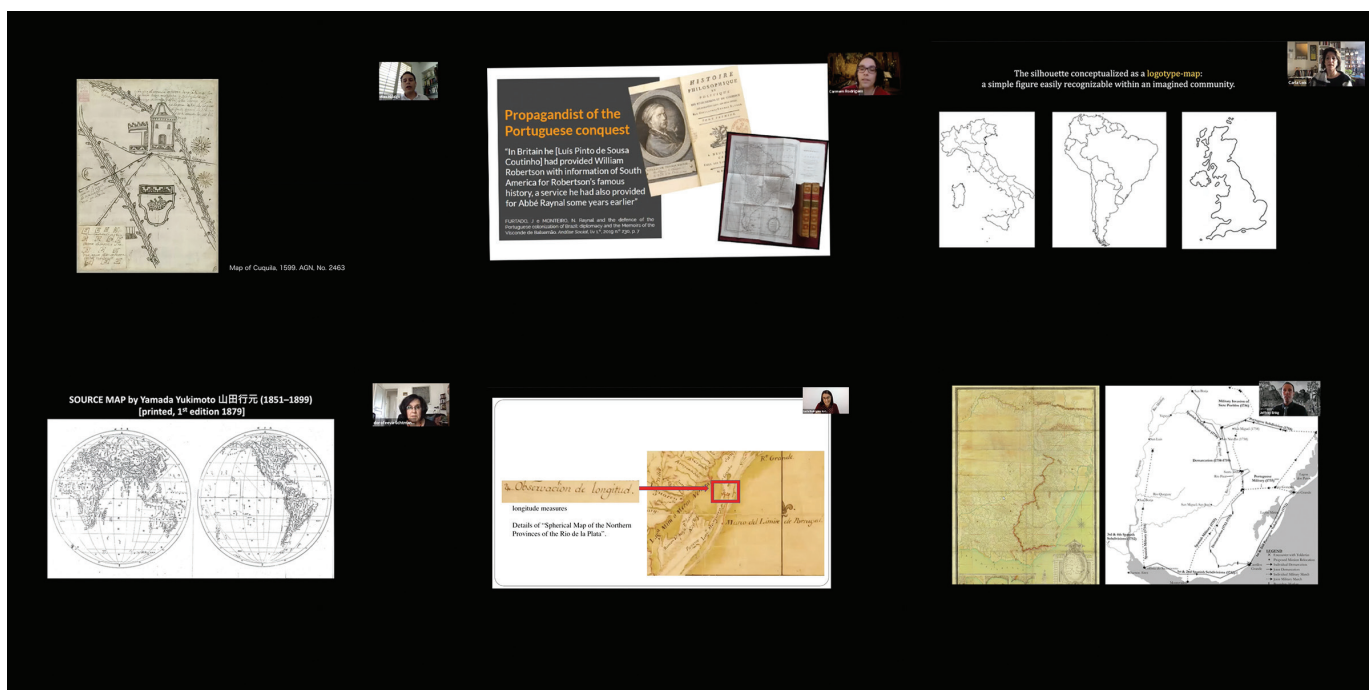


Figure 5. Examples of six presentations with effective visuals. Clockwise from top left: Alex Hidalgo, Carmem Rodrigues, Carla Lois, Jeff Erbig, Lucia Arrillaga and Veria Dorofeeva-Lichtman. Black background is a classic way to showcase images and captions. White and themed backgrounds, as well as accent colors and image rotation, can be effective if used intentionally and sparingly.

PLACING VIRTUAL EVENTS

In terms of lessons learned, some choices that came out of crisis planning will be retained. For example, even for online events, we will seek a “local” collaboration, which provided the event with a geographic identity and stakeholders. With a planned home, ISHMap 2020 felt “Brazilian” and “American”—both in the presentations and the audience—in a way that a “no-home” event would not have. Registrants identified affiliations with fourteen universities from throughout Brazil. The “locale” influenced organizers’ choices about event times, book chat invitations, and more.

Without a physical home, organizers should be mindful that a virtual symposium could default to a more national or regional focus and attract more faithful than adventurous participants. We look forward to incorporating pre-recorded or live “grounding” activities to introduce the host community, such as virtual walking tours, and to foster engagement with local resources, such as a virtual exhibition or “field trip.” With our São Paulo partner institution closed because of the pandemic, and all organizer energies devoted to transitioning to an online format, ISHMap 2020 could not deliver our goal of offering such an opportunity.

SCHEDULING AND PROGRAMMING BORN-ONLINE EVENTS

For born-online and hybrid events, lessons from this symposium would shape planning from the start. For example, ISHMap will talk through ways to accommodate participants in distant time zones, and privilege finding hosts in different regions so that no one region is regularly “distant.” In the future, ISHMap will invite virtual and local hosts to identify moderators and secretaries and finalize training plans at least six months before the event. With longer planning times, we also anticipate rethinking the symposium schedule. Academic, including map history, programs are now spreading an event over several weeks, rather than a few days. To share scholars’ work online can also move beyond presentations. Going forward, we look to a model such as that provided by Stanford University’s David Rumsey Map Center, which recently placed online a virtual exhibit based on map analyses provided by speakers at the 2019 “Mapping the Global Imaginary, 1500–1900” symposium (Site: <https://exhibits.stanford.edu/global-imaginary>).

Logistically, materials, staffing, post-symposium work, closed-captioning, and interactivity operate differently online than in person. We plan to review and update the materials and workshops developed for ISHMap 2020 for the format(s) selected for anticipated hybrid 2022 and 2024 meetings, so that such guidelines are available to organizers and potential participants from the moment that the

call for papers is distributed. We will also think through and staff post-program work, which we did not fully anticipate as we acted swiftly. Assigning responsibilities for the Prize Committee and editing and publishing symposium video recordings should be part of the workflow. Recording videos in Zoom was effective and automatic. The session recording both facilitated and increased the work of the Prize Committee, whose members could review talks they had not seen live. We were fortunate to recruit three volunteers to share the work of “branding” session videos by inserting the symposium’s session slide with logo and panel information at the front, and adding a slide with links to the ISHMap 2020 program at the end. Within a month, they edited the sessions, removed presentations by those who did not give permission for the Society to host them on its newly-created YouTube channel, and added session slides. A fourth person uploaded and created metadata for the files, then shared them with participants and the public, and added links to the program webpage (<https://ishmap.wordpress.com/ishmap-2020-program/>). Recruiting video editors and media managers ahead of time could potentially speed up the timeline. ISHMap meetings are held in English, which provides broad access for participants but can be a barrier; some among us would recommend exploring closed captioning and synchronous translation (via chat) for some sessions in future.

The main limitation with our event was in translating a highly interactive program where most direct engagement happens between sessions to a conference with reduced time for informal and participant-to-participant interaction. For those planning online or hybrid conferences, options might include: “hallways” before and after the conference starts for pre-event chats, whether unmoderated or moderated, of general interest or thematic, planned or *ad hoc*; mixing presentations with interactive sessions such as workshops, virtual poster sessions, and small group discussions around pre-circulated papers, grant or publishing opportunities, individual or institutional collection strategies, or resources in different repositories. While the “book chats” were fantastic palate cleansers and a change of pace between main sessions, we learned that true “biological breaks” of at least five to ten minutes should be scheduled. While we built the “book chats” to minimize anticipated “audience melt” between, we experienced a different challenge: many participants at ISHMap 2020 did not want to miss them and made strategic choices to participate in them that sometimes cut into panel meeting times.

IN CONCLUSION

Although ISHMap did not anticipate hosting a virtual symposium in 2020, the conference theme of “breaking boundaries” encouraged rewarding experimentation in an untested format. The investment by the Organizing

Committee and Trustees in moving online rather than canceling the conference was matched by the international map history community. Presenters pioneered live online talks with screensharing. Registrants both signed up and remained attentive and curious throughout. Volunteer moderators, secretaries, social media users, and video-editing mavens created a community experience for all involved. Increased global registration and attendance demonstrated that an online event can expand synchronous and asynchronous access to expertise and bring together more and more kinds of map aficionado than an “on-the-ground” event. Going forward ISHMap anticipates hosting and attending online and hybrid map history events whose hosts keep them ‘grounded’ and which cross-pollinate to offer interactivity and synergies online and increase accessibility to in-person gatherings. Offering two formats simultaneously will increase infrastructure and personnel requirements before and during the event and demand development of activities to serve both virtual and in-person attendees and presenters and foster engagement between them. Having benefitted by reaching a diverse community from Brazilian and Greek undergraduate students to European archivists and map collectors to Indian scholars, the organizers look forward to incorporating lessons learned from the symposium and from the libraries, conferences, and working groups that continue to innovate.

ABOUT THE AUTHORS: *Jordana Dym*, Professor of History and Director of Latin American and Latinx Studies at Skidmore College, is Chair of the Trustees of the International Society for the History of the Map. Her interests include the intersection of the histories of travel and cartography, and the mapping of Guatemala. See <http://skidmore.academia.edu/JordanaDym>. *Denise A S Moura*, Professor of History of Colonial Brazil at São Paulo State University, is a member of the International Society for the History of the Map. Her research on eighteenth-century mapping expeditions in South Brazil with financial support of The São Paulo Research Foundation (FAPESP) since 2015 has been published in articles in journals including *Portuguese Studies*, *Revista do Instituto Histórico e Geográfico Brasileiro*, and *Terra Brasilis*. Her current book project studies the cartographic invention of the borderlands of South Brazil after the failure of the Treaty of Madrid.

ENDNOTES

- 1 The event’s Zoom Tips for attendees focused on getting signed in (<https://ishmap.wordpress.com/annual-meeting/ishmap-symposium-2020/registration-virtual/zoom-tips/>), and those for participants focused on how to set up for optimal visual and audio experience (<https://ishmap.wordpress.com/annual-meeting/>

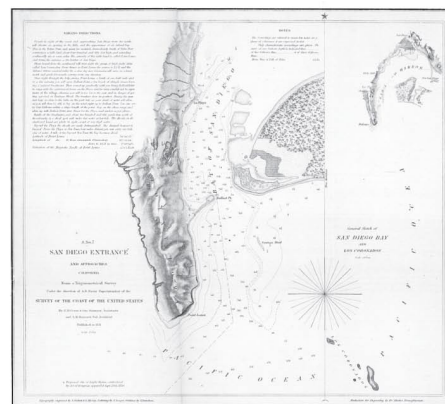
ishmap-symposium-2020/registration-virtual/participating-in-virtual-ishmap/. For example, we invited panelists to think about how seeing a map on a small screen might impact the intelligibility of the talk and encouraged use of high-resolution images and map details that would be legible to viewers.

- 2 At a conference held one week before ISHMap 2020, the organizer had set up multiple concurrent sessions using a single Zoom license, not realizing that only one could be open at a time. A synchronous Zoom event requires as many individual licenses as open sessions. For ISHMap, we used four Skidmore licenses and no individually-created back-to-back sessions (meetings). Another solution would be to ask participants with licenses from different institutions to set up meetings and share links to the recordings afterwards.



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