Tips for Remote Thesis Defences and Oral Qualifying Exams

This document provides some general tips for students, examiners and other participants of oral thesis defences and doctoral Qualifying Exams. For more details on conducting such exam, please refer to the Guidelines.

Tips for students

Before the defense

- Plan your physical space for the defense:

  - Be sure there's no glare from sunlight or other light behind you, but also ensure that there is enough light so that you can be seen without a shadow.

  - Try to sit in a quiet location without too many distracting things behind or around you.

  - Access to two monitors will make the process a bit easier; you can see your slides on one monitor as you present and still see committee members on another monitor, to see reactions. It may be possible for your television, with an HDMI cable, to be a second monitor.

  - You'll have an opportunity to test your system prior to your defense. We recommend you carry out this test in the same location that you plan to use on your defense day.

  - When you test your system, consult with the exam chair for tips or recommendations to enhance the technological experience. Ask them how in-camera parts of the defense will work (e.g. the deliberation portion) and how you will return to the video call once the in-camera session is complete.

  - Make sure that your internet can handle the video call. It is best to connect to your modem via an ethernet cable instead of using WiFi.

  - Plan what to wear. Dress as you would for your in-person defense. It will help put you in the right mindset and will help the defense feel more official and celebratory, even if you're in your kitchen!

  - If you think you might need accommodations for your defense because of a disability, contact Student Accessibility Services as soon as possible.

  - If you've been in self-isolation or you've been social distancing for a while, think about doing a conference call with colleagues a day before the defense - warm up your vocal cords and get used to talking for a long while again.

- Format your slides

  - Format your slides for easy viewing online—try to eliminate any transitions or animations because these may be glitchy with overloaded video conferencing platforms.

  - Number each slide so it's easy for everyone to navigate to the same one if needed.

  - Distribute slides to your committee in case they have any difficulties seeing your screen share.

During and after the defense

- Use a headset, you will sound much clearer and reduce feedback from the microphone.

- When delivering the presentation, sit and be sure that your webcam has a good shot of you from the shoulders up. In a live defense, you would probably be standing, but that won't work here since you won't be as clearly visible (you don't want to suddenly be defending only from the neck down).

- Remember to look at the camera when you are talking (and not at the screen you are presenting, particularly if you are using two monitors).

- Consider hiding the chat pane until after you have finished speaking to avoid distractions during your talk.

- Consider using a paper notebook to record the feedback you receive by hand instead of typing it out – this will give you more control over how you're presenting on the camera and will prevent unnecessary background noise and the possibility of your screen becoming shaky.

- Consider asking a colleague or friend who plans to attend your defense as an audience member to be your notetaker.

- Even though your defense is remote, try to ensure you have access to a print version of your thesis with key sections marked with flags or bookmarks. This will allow you to quickly find the relevant sections that the committee would like to discuss.

  - If you can't get a print version, try to have a digital version on a separate device so you don't need to flip between your thesis and the video call or presentation.

  - Referring to specific parts of the thesis might be a challenge in a virtual environment. Refer to specific page numbers or figure headings and wait for everyone to be on same page!

- A remote defense might feel a bit anti-climactic. Be sure to find a way to celebrate your success with friends and family after the defense wraps up. This is a huge milestone and an impressive accomplishment. Set up a video call with your close friends, family and colleagues – and celebrate!

Tips for the exam chair

- If you have invited others to view the defense, mute them when they enter the meeting.

- Ask all the committee members and student to join the meeting 10 to 15 minutes early to ensure everything is working.

- Provide a phone number for audio access if there are issues with the internet.

- Either ask all audience members to mute themselves at the start of the oral presentation or ideally mute them all centrally.

- If possible, turn off the chat function until after the student has finished speaking to avoid distracting them during their presentation.

- Have a plan for how to have the student "step out of the room". This will depend on the meeting platform. If nothing else, the student can exit the meeting and be invited to join again after the committee's deliberations are complete.

Tips for exam committee members

- Use a headset. You will sound much clearer and reduce feedback from the microphone.

- Join the meeting 10 to 15 min early to ensure your technology is working.

- It is difficult for the student to know how they're doing without an audience and a limited ability to read your body language. Consider exaggerating your positive responses with head nods, thumbs ups, or big smiles to help mimic normal positive audience feedback.

- It's much more difficult to build rapport in a virtual context. Leave a little bit of time at the beginning of the defense for small talk. This will help the student feel comfortable with the committee and set them up for success.

- Don't multitask during the defense. We are all tempted to do this in the online environment, but this is not a regular online meeting. The student defending has spent years anticipating this moment.

- If necessary, committee members who are not asking questions can turn off their video during the oral exam session.

- As a committee, unmute your microphones at the end and give the student an audible round of applause!

- Try to minimize required changes to the thesis itself. Clearly distinguish recommendations for changes prior to submitting papers from changes required for the thesis.

Tips for the audience:

- Keep your microphone muted unless invited to speak by the exam chair.

- Join with your name or a static profile picture to cut down on visual distractions.

- Do not send the student any messages in the chat during the defense. If appropriate the exam chair will invite questions from the audience after the oral presentation is done.

Acknowledgements and sources

Many of these tips were borrowed from documents created by students or faculty who have recently attended a remote defense. The following sources were most helpful:

U of Waterloo, Graduate Studies and Postdoctoral Affairs, Remote defense: tips for success
Alyssa Frederick, Advice for Defending a PhD Remotely
Ashton Merck, Defending a Dissertation by Videoconference
Ethan White (@ethanwhite), https://twitter.com/ethanwhite/status/1240336385896316928