

# Tips for Virtual Meeting Facilitation

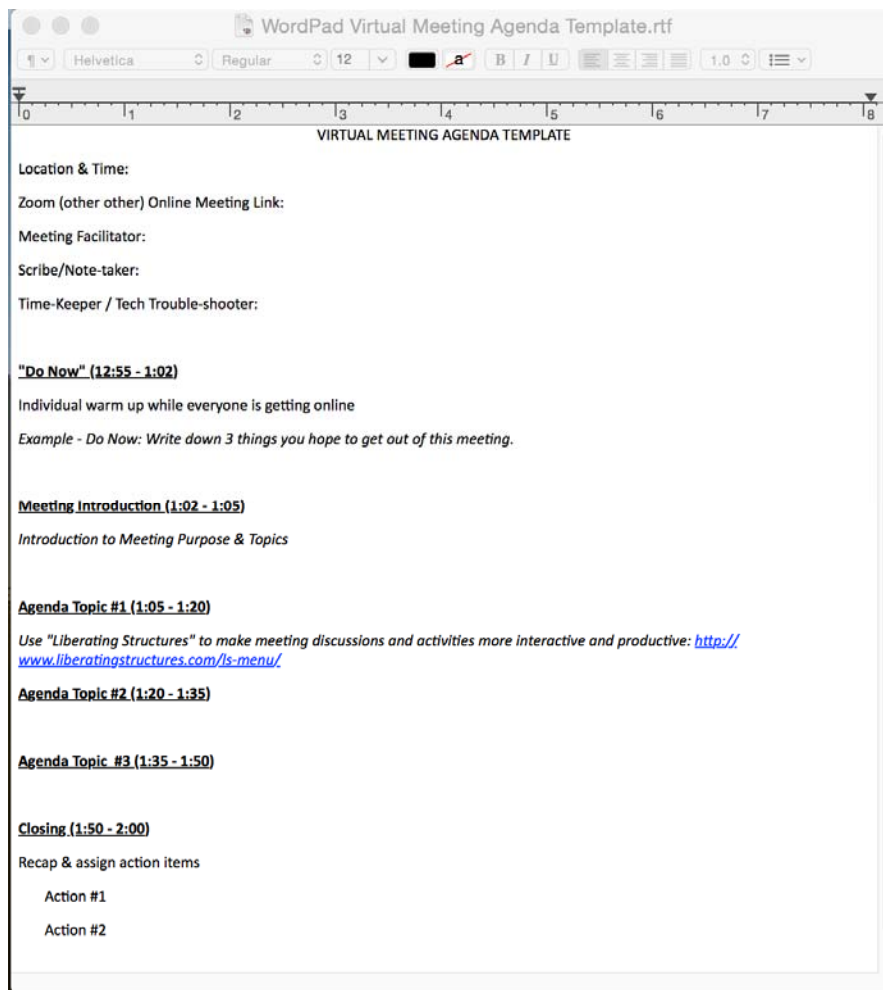
The purpose of this information is to improve the experience of virtual meetings for facilitators and participants in order to encourage collaborative work. It includes tips and templates for facilitators at various stages of the meeting, as well as general best practices for virtual engagement. Some aspects of this document apply to meetings with full virtual participation, while others are for a blend of in-person and virtual groups.

## Facilitator Tasks

### BEFORE THE MEETING

#### BUILDING THE AGENDA

- Organize your meeting details on a single page, in readable table with columns for timing, topic (the what), purpose (the why), and notes with any additional links or documents to reference (the how). Attempt to include all external and document links within the agenda, so participants do not need to sort through emails to access them.
  - [Click here for a Google Doc Agenda Template](#) that you may copy and use.
  - If you or your meeting attendees do not have access to Google Docs, use a free universal word processing application like WordPad (which comes pre-loaded on Windows computers and does not require a paid subscription like the newer Microsoft Office applications) See the following meeting template created in WordPad:



- Build interactive and varied ways to contribute to allow equitable participation regardless of a participant's location (i.e. shared note-taking in a Google Doc or other online platform; see "Additional Resources" in the What Works Solutions Entry: Isolation in Rural Schools—Virtual Meeting Facilitation).
- Check that links and share settings are correct to allow appropriate access to accompanying documents (i.e. editing abilities or read-only).

## PREPARING PARTICIPANTS

- If there are several main meeting locations, have a facilitator at each site and a means for them to communicate with each other (i.e. chat program, text).
- Send the agenda, links, and all accompanying documents to all participants in advance.
- For the first meeting, set up Zoom (or other video conferencing platforms) accounts well in advance as account confirmation can take time to process. Remind participants to do this as well.

## BEGINNING OF THE MEETING

### FIRST MEETING

- Set clear expectations and norms for participating virtually (See Virtual Etiquette below).
- Share your screen to show where different view options and commands are.
- Prepare a conservative agenda to allow all participants to ease into virtual participation.

### GENERALLY

- Assign roles for a facilitator, scribe, and timekeeper (using a phone or timer). Depending on the topic and your comfort as facilitator, it can be hard to contribute and play all those roles, so delegate. It is usually easiest to delegate a scribe and pair the facilitator and timekeeper roles together.
- Review the group's mission, the purpose of the meeting, the agenda, and clarifying any external links or documents that will be used later in the meeting.
- Notify members of alternative modes of communication in case video communication drops off (i.e. chat program, text).
- Starting off with a brief (5 minute total) update from participants can strengthen group dynamics and comfort.

## DURING THE MEETING

- Reference and announce the documents/links you are using so participants can follow along.
- Utilize discussion protocols, rounds, or other structures to provide scaffolding for equitable participation (open discussions can make it hard for virtual participants to interject).
- Frequently check in with remote participants (thumbs up/down for quick pulse), especially before moving the discussion to a new topic.
- Have the timekeeper give time checks for each topic and use a device with an alarm so all participants can hear when time is up for a topic.

- Debrief with all participants about their experience (with discussion protocols and/or technology) in order to understand and improve for next time.

## AFTER THE MEETING

- Send out a follow-up email with cleaned up notes, so that all participants can review all of the details, the date and time for the next meeting, and any action steps.

## VIRTUAL ETIQUETTE

- Review etiquette for virtual participation whenever there is a new participant.
- Mute yourself (and others) when not contributing to eliminate background noise.
- Disable the video function (remaining on audio only) for better internet connection if it's getting glitchy.
- Begin a discussion using rounds or an assigned order to contribute, followed by popcorn style after several rounds. This helps create awareness about how many times participants are speaking.
- Instruct participants to raise hands, or some other visual cue you can see on screen, if they want to contribute.
- Establish alternative modes of communication in case video conferencing drops off.
- Begin the meeting with a warm-up activity.
- Use a similar format for every meeting, so that participants become comfortable with the consistency.
- Send out the Zoom (or video conference) link, a reminder of the meeting time, and the agenda before the meeting (earlier if participants are to review lengthy documents).
- Follow up the next day with action steps and cleaned up notes.

## TIPS FROM THE FIELD

### BLEND VIRTUAL AND IN-PERSON PARTICIPANTS

[Note: this is perhaps the most challenging combination to facilitate as it can be easy to devote more attention to in-person than virtual participants.]

- Make name cards for those participating virtually, so they are not forgotten.
- Start or end with virtual participants when sharing in rounds.
- Make the agenda interactive to level the playing field for participation.

### MAKE IT INTERACTIVE

- Google Docs streamlines an agenda and allows documents to be linked into the agenda instead of separate attachments in email; allows for joint/live note-taking (if share options are allowed).
- "Do Now" exercises allow participants to transition into the meeting space with focused time to get situated even if there is a staggered start.
- Virtual check-ins (either for a follow-up or check-in) using a Google Doc with a blank chart can allow the facilitator to get a quick pulse of how the group is feeling (i.e. is pacing too fast/slow; in need of a bathroom break)

- A closing activity or debrief using the shared note-taking capabilities of Google Doc allows the facilitator to capture lessons learned, questions left unanswered, etc. without using up the time for everyone to share out loud. Participants can also review these comments.