

Some Tips and Suggestions for Virtual Meeting Facilitation

Gathered from UNCG members [UVA's Institute for Engagement and Negotiation](#) and [WSU / UW's William D. Ruckelshaus Center](#)

Best Practices for Remote Convening

- Make sure there is light on your face – as opposed to light on your computer screen – so that your face (and eyes) can really be seen and is not in shadow.
- Two staff (at a minimum) to lead the meeting, with clearly defined roles agreed upon ahead of time:
 1. Facilitator to focus on substance / quality of the discussion/ and editing document (recorder function). (If you have the luxury of a 3rd person, they could be recorder/document editor)
 2. Technical Lead to focus on technology management (break outs, pop-up polls) + chat bar. Possibly could be document editor.
- Break any discussion segments up into 15-20 minute chunks. Long discussions will create fatigue and frustration more easily over video than in person.
- Keep agenda items / objectives to around three per meeting.
- Honor start and end times as with any other meeting.
- Include written agenda + link / phone for access in the body of the outlook invite planner as well as in a separate email. Attach any relevant documents, emails to the outlook planner and the separate email. It should be easy for people to find the link and all relevant meeting information.
- Lay out Virtual Meeting Guidelines in writing beforehand.
- Begin with an acknowledgment:
- Thank them for taking time to join the meeting, and the challenges/stresses we are all facing
- *Instead of ground rules:* do these kinds of things.
 - Ask them to listen and stay as present as possible – acknowledge that this is hard on a call – and just do the best they can. If they have “executive assistants” (children) joining them, or distracting them, please know we’ll all understand, but pls be sure they are on mute.
 - With large groups, ask them to all stay on mute, unless they are called on. If they wish to be called on, please “raise your hand” or send a chat message
 - Orient them to ways to engage during the call other than speaking:

- Ask them to use chat for friendly banter and sideline conversations, can be individual with one other person, or with full group
- Show them how to “clap” or wave their hand
- Show them how to give a thumbs up/down and also (since we are all about consensus, and need a third intermediate gradient of agreement), how to do a thumbs to the side (thumbs down plus hand wave, or something like that that you’ve designated ahead of time)
- During introductions, ask each people to share how much of them is here - % wise – to share if they’re able to set aside what is happening in their lives, or what they’re dealing with and how much of them is able to be present. One of the facilitators can demonstrate and lead with their response to allow other people to feel comfortable sharing where they are.
- Orient them to what will be happening differently - i.e., if they’ll be broken out into small group chat rooms, and if there will be pop-up polls
- Take time at beginning to acknowledge how scary this time is and that ppl are distracted, but share your gratitude for them joining the call. Restate this at the end.

Technical Tips for Zoom

- Create a unique meeting id for all formal meetings. Only use your personal id for internal huddles.
- Overall tips: having good audio is the single most important factor. If folks have slow Wifi, they can connect with video and use phone line to join the audio. Mute yourself, and ask others to do the same, when they are not talking.
- Use chat function for general, slightly off-topic commenting on what speaker says (<https://medium.com/@erinargyle/working-during-covid-19-how-to-be-good-at-video-meetings-57f49fdb8dcd>)
- Use breakout groups to split people into smaller groups for discussion. They can “call” the main facilitator in to help. General tutorial for creating/managing them: <https://support.zoom.us/hc/en-us/articles/206476313-Managing-Video-Breakout-Rooms>
- Can do live editing on shared screen
- Zoom has a Thumbs-up feature you can use to gage whether participants support a proposal or decision (no Thumbs-sideways feature, but in theory you could have them abstain or use “Raise Hand” as “I can live with it” or Thumb-sideways)

Alternatives to Zoom/Technologies Overview:

WebEx – for delivering information to large groups and taking questions from individuals. We have not used WebEx ourselves, but Tanya has been on WebEx platforms. Zoom seems to have similar capabilities.

YouTube/ Kaltura/ Other – for delivering information (pre-recorded, asynchronous delivery – now being used as part of teaching remotely)

Facebook – a tool that can be used in different ways – e.g. 1) event pages, and project pages, where information can be pushed out via YouTube/pre-recorded messages; 2) information can be received via comments, and 3) live event streaming. Facebook could be useful in light of its accessibility for so many potential stakeholders.

Google Forms - is a good, accessible option for basic survey functionality. However, it is really basic and does not allow analysis of results. Analysis possible only after data is extracted from the Google Form.

Zeetings – a super easy survey tool that can be used to create a number of different types of polls.

Qualtrics - a much more sophisticated survey tool that can also be used and which universities may have access to through the University. Offers analysis of results.

SurveyMonkey – another more sophisticated survey tool that offers analysis of results.

MetroQuest - interactive survey – yes! We almost used this years ago, but the project budget couldn't swing it. We've always seen MetroQuest as the "Cadillac" of interactive survey tools. Its specialty is transportation surveys, but it should be easy to repurpose its functions for non-transportation issues. If the City has an account with MetroQuest, that's pretty awesome! We

MindMixer –less costly than MetroQuest but proved extremely time-consuming and problematic in numerous ways.

Konveio – interactive document content development and engagement. This could be used as a place/way for people to be able to see a plan as it develops, and to make comments. See samples of it [here](#).