



Virtual Meeting General Guide

PURPOSE: To provide a list of questions and standards that should be used for setting up virtual meetings.

Virtual Meetings Definition:

- One on one with a team member, your manager or supervisor
- Internal Team Meetings
- One on one calls/meetings with external partners, members or peers
- Committee Meetings
- Webinars
- Virtual Conference Events

SECURITY: It is important to remember that all virtual meeting tools can have security issues, if settings are not configured properly.

QUESTIONS TO ANSWER

- Determine the Organizer of the meeting
 - Who is the person to schedule the meeting, send out invites, secure audio and video links and passcodes from the tool you will be using?
 - Check with your IT to make sure you have sufficient bandwidth, ports, etc. to accommodate everyone
 - How long should the meeting last?
 - Who are the participants?
 - How long will the virtual meeting last?
 - Are times convenient for all attendees (keep in mind time zone differences). Work to schedule around mealtimes (i.e. lunch)
- Determine the Facilitator for the call
 - What are the principles regarding staying on track?
 - Assigning times to the agenda will help with this
 - Utilize the raised hand icon, chat or question feature in the virtual meeting tool will help as well
- Agenda:
 - Determine the objectives?
 - Decision-making,
 - Issue reporting?
 - Information exchange and education
 - Develop agenda and send out in advance (two – five days)
 - Assign timeframes to the agenda to help stay on track during the virtual meeting
 - Determine who will capture decisions reached, minutes, etc
- Attendees:
 - Confirm that all participants have reasonable access to videoconferencing technology from wherever they are?
 - Convey attendee expectations (Does an attendee have an assignment?)

- Can someone participate "half-way?" Is multi-tasking during the virtual meeting permitted?
- If an attendee is a presenter, have them send their presentation in advance (or practice how you will give them presenter rights so they can share their screen and powerpoint).
- Determine what additional mechanisms the team will use to share ideas and provide input
 - During the meeting attendees can use chat or question box as well as whiteboard features.
 - Between meetings, attendees and team members can use a team portal, group chats, IMs, email, etc.

General

- Test the software program before your meetings and become familiar with differences between programs: GoToMeeting, GoToWebinar, Zoom, WebEx.
- Do test runs with 2-3 people to make it manageable before conducting in larger group.
- Take 30 minutes before the meeting starts to practice video, audio, muting and unmuting, screen sharing, presenter sharing, chatting and questions.
- Use video, if possible, to keep people's attention.
- Have an agenda and script that include when presenters will need control and when to unmute attendees for questions and comments.
- Start meetings 30 minutes early to test audio, web cam and screen sharing, and solve attendee problems.
- Use phone(s) call-in number for those who can't be at their computer
- No members of a Zoom call are required to give their consent for the call to be recorded, but are notified when it is being recorded and have the option to leave the meeting.

Starting your meeting

- Ask users to mute from their end, if possible.
- Do test runs with 2-3 people to make it manageable before conducting in larger group.
- Verbally identify yourself before speaking.
- Take a roll call vote for all motions/actions.
- Explain the agenda and chat/question options to attendees.
- Ask speakers to announce themselves before speaking. (You can ask this of members of public who decide to speak at public comment portion, just as you would in a regular meeting.)
- Don't attempt to achieve total proficiency before using, try it and work out the bugs as you move along.
- Accept that mistakes may happen with first time use but you can't correct those mistakes if you don't formally use it.
- Know that you'll get better each time you use it.
- Allow for a little extra time to conduct the meeting, you may or may not need it.