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.