

## ***Leading and Participating in Virtual Meetings – Tips and Etiquette***

Virtual offices are our new reality. Having the ability to hold virtual meetings, lectures, interviews, and other group communication allows participants to meaningfully engage in discussions without needing to travel. However, a few guidelines will help maximize the experience for everyone. While these guidelines suggest that you will have your camera on (which most platforms allow), they are still relevant for just phone connections.

More people than ever are using distance delivery tools, so having back-up options for meetings is essential. It is very possible that a system will go down and everyone needs to know the back-up plan to ensure that your whole meeting time is not consumed with dialing into the meeting itself.

Above all be kind. Be patient. We are all doing the best we can.

### **Leading a phone or video virtual meeting:**

- Leading an online meeting requires planning and careful consideration. It takes all the prep work of an in-person meeting and a little extra.
- Pay extra attention to making sure everyone has a chance to express themselves. Remember that some people are quick to speak while others need more time to consider their thoughts. Create space for everyone to participate.
  - If you are the leader, pause and invite everyone to speak on a topic before moving on.
  - Leave gaps long enough for people to unmute their microphones and ask to speak, if the mute option is available. Otherwise, all participants should be aware of the time delay (usually 1 to 3 seconds).
- The use of video conferencing as opposed to face-to-face meetings can be a little dampening to "vigorous debate." However, in principle there is no real reason why people cannot still have their say – they just have to be a little disciplined about it.
- Assign someone on your team to track the comments on the chat function to ensure you are catching people who can't use their microphone, or are having technical difficulties, or simply prefer this mode of communication.
- If you and another person, like your executive director or board chair, are in separate rooms, consider having a private chat option to coordinate timing and necessary adjustments to keep the meeting running smoothly.

### **Crafting an agenda**

- Set aside 10-15 minutes for meeting preparation. This is the time for participants to log in and be sure the technology is working for them. Post this time on the meeting agenda and include it in the meeting invitation.

- Include time in your agenda to connect to mission and values.
- Allow everyone to check in at the beginning of the meeting. This can take the form of anything from a rollcall to a more in-depth introduction. Not only does this welcome everyone, it subtly sets the expectation of participation.
- Post times to help guide the group conversation and yourself. Don't be overly prescriptive, but instead focus on some rough markers to keep the meeting on track.
- Place open-ended questions on the agenda to inspire full participation.
- For items that require a decision, consider posing the clear choices on the agenda or in supplemental documents to focus the discussion.
- Build in some fun.

## **Preparing handouts and other materials**

- Send out materials ahead of the meeting in case technology fails and only phone connections are an option. Compile all your documents in a PDF.
- Practice posting your materials in advance. Each platform has its own tricks.

## **Participating in a meeting:**

- Turn on your camera if you can. This helps everyone feel more connected.
- If you are on the phone, say your name before speaking.
  - If you wish to speak, wait until the Q&A is announced. In meetings alert the leader by raising your hand or using another non-verbal signal. Wait to be recognized before speaking.
  - If you are using Zoom or a similar platform, a chat bar is available. Some platforms have a "raise hand" function. Become comfortable with the platform you choose.
- Ask open-ended questions to encourage full participation from your peers.
- Focus on the meeting and fully participate (block out other distractions).
- Stay present! Be attentive and engaged during the meeting. Remember, you are "virtually" participating in an in-person meeting, so the following behaviors are highly discouraged:
  - Carrying on conversations with other participants during the meeting
  - Working on a computer, or doing other work
  - Talking on the phone or texting – it is better to step away from your computer
- Be aware that background noise can be very disruptive on a video or phone conference call i.e. shuffling papers, whispering, drumming your fingers, typing etc. If possible, mute your microphone unless you are actively engaged in conversation. If muting isn't possible, call in separately on a phone, which often helps with sound quality.

## **Lights, camera – let's meet (additional tips specifically for meetings using a camera)**

- Ensure that lighting conditions are suitable. There needs to be light on the face. Adjust all blinds or shades to reduce glare and backlight. Avoid sitting near a window during daytime, even with closed blinds
- Position your camera so that others see more than the top of your head or the ceiling. It's best if they can see you from the shoulders up. Remember this is the next best thing we have to in-person interactions, so we want to be able to see each other's faces.
- Clothing considerations for the camera – especially if you are leading the meeting:
  - Avoid all white or black clothing depending on the lighting in your space
  - Remove accessories, like bracelets or necklaces, that could create noise

## **Five virtual technology tools with high ratings to consider for group meetings**

*Note: If you are doing smaller meetings of a few people, Microsoft Teams, Facetime, and WhatsApp can be easily downloaded on your mobile, and they are free.*

[Zoom](#): Easy to use – has recording ability.

[Go To Meeting](#): Free trial is only for 14 days so good for short term – log on is easy and quick.

[Ring Central](#): Currently free for K-12 schools and educators or nonprofits – all else pay a starting rate of \$19.99 per month.

[BlueJeans](#): Easy to register and interface is very much like ZOOM – great color scheme – easy to call and easy connection. They offer a 14 day free trial.

[Google Hangout](#): Works fine. There is a free trial and then a cost. Like ZOOM, you can record meetings, which not all services offer.

[Avaya Spaces](#): Easy setup on desktop as well as mobile. Like Ring Central, they're offering their services at no charge to educational and nonprofit organizations worldwide through August 31, 2020. A basic free option is also available.