



Prepare for the meeting

1. Follow general good meeting guidelines for *any* meeting:

- ✓ Assess what kind of meeting is required (some meetings are information sharing, some require collaboration and decision-making), structure meeting approach and materials accordingly
- ✓ Consider needed roles based on size and purpose of meeting: e.g., facilitator, moderator, notetaker; capturing notes live is a skill - choose notetaker carefully; roles can be combined or distinct
- ✓ Communicate purpose and desired outcomes
- ✓ Share ahead of time: agenda with timing, roles, and relevant materials

2. Set expectations for everyone to use video if possible:

- ✓ Send necessary tech info ahead: web link, audio only option, etc.

3. Test technology ahead of time:

- ✓ Is software downloaded and working?
- ✓ Do speakers, microphones, and video work?
- ✓ Do you know how to share/un-share, use polling tools, raise hand, mute/unmute participants, monitor chat, use whiteboard features?
- ✓ If recording, know your system capabilities for length and storage?
- ✓ Are facilitator, moderator, and notetaker comfortable using the tools?



Conduct the meeting

1. Facilitator sets the tone:

- ✓ Create a safe space welcoming input/ideas and transparency, review purpose and desired outcomes
- ✓ Good enough – make realistic calls regarding time on a topic; explicitly give everyone permission to call “good enough” to keep meeting moving
- ✓ One speaker at a time - use a moderator if appropriate
- ✓ Manage time, use the agenda - start on time and end on time. If adjustments are needed to end late, ensure alignment
- ✓ Be willing to let go of the agenda if it serves the purpose

2. Manage communication:

- ✓ Use your moderator if necessary - ask participants to “raise their hands” when ready to speak or send questions/comments to the moderator if needed
- ✓ Keep an eye on “parking lot” issues (e.g. items that are important, but not directly tied to the agenda and desired outcomes) - capture and set expectations for follow up
- ✓ Clearly identify action items with accountability and due dates
- ✓ Communicate where/how notes will be shared and how participants should respond to notes afterwards (as needed)



Rules of Engagement— Leader & Participant Behaviors



Leaders

- Watch for and act on signs of unease, disagreement, or conflict (i.e. “I wonder what others think...”, “I hear silence on this...”)
- Poll the audience to get everyone’s input (signs of frustration may not be visible) consider prepping the polls ahead of time
- Consciously notice the energy of the group and adjust accordingly;
- Watch for and acknowledge out loud when speaking over each other is happening; ask moderator help facilitator recognize speakers via chat windows
- Acknowledge accomplishments

Participants

- Use video - make sure faces are visible; Use mute sparingly - e.g. only use if someone is presenting or if there is distracting background noise
- Eliminate distractions (close your email; turn your phone face-down and notifications off, no notes between participants)
- Respect others – seek to understand
- Speak your truth - welcome dissent and allow for productive conflict
- Practice active listening; be present without multi-tasking
- “Raise your hands” and/or send questions via email/chat functions if speaking over each other becomes an issue or if audio issues arise