ICA Virtual Meeting/Webinar Guidelines

VERSION 1, UPDATED 3/18/2020

PURPOSE OF DOCUMENT

This document aims to provide guidelines and tips for ICA staff in navigating a virtual meeting environment. Humans are great at face-to-face communication, but sometimes we need a little extra help and planning to make a virtual meeting a success!

Some of these tips may be more or less relevant depending on the formality of a given meeting or webinar. As GoToMeeting and Teams are our most common virtual meeting platforms, the majority of this document will apply to those products.

Our goal is to have productive meetings and to avoid reenacting this "Conference Call in Real Life" video.

ATTENDING A VIRTUAL MEETING

GENERAL GUIDELINES

- **Be on Time:** Aim to arrive to virtual meetings at their scheduled time. If you are unfamiliar with the platform, try to arrive a few minutes early
- **Pay Attention:** With a computer in front of you, it is often easier to get distracted by email or other projects during a virtual call. Aim to limit distractions as much as possible
- **Say Your Name:** It can be helpful to say your name before speaking. This is more important on conference calls (without a visual alert re: who is speaking) and in meetings where folks may not recognize each other's voices.
- **Pause:** There is usually a delay between when you are speaking and when others are hearing what you say. Allow others time to hear and then respond to what you've said.
- **Speak in Short Bursts:** Unlike in face-to-face conversation, we don't have real-time visual cues to know when someone else wants to say something. Allow time between thoughts for other people on the call to jump in.
- **Don't Interject:** When possible, wait for a pause to begin speaking and avoid interrupting others. Because of the delay, an interjection often results in multiple people speaking at the same time. It is easier to prevent this problem than to resolve it once it happens.
- **Choose a Quiet Location:** Try to take the call in a quiet location with minimal auditory disruptions.
- **Find your Mute Button:** Be aware of how to mute your microphone. Before speaking, make sure you are unmuted.
    - When to mute:
        - Before sneezing, coughing, talking to someone not on the call, etc.
        - During bursts of unexpected noise (sirens, dogs barking, etc.)
        - While typing notes
    - When not to mute:
        - When it will encourage distractions

- On more informal calls, when you are speaking a lot, if you find yourself forgetting to unmute before speaking

TIPS

- **Hydration:** Start the meeting with a full glass of water within easy reach
- **Buffer time:** Be sure to budget time in your schedule (between meetings) to allow breaks to eat, get water, stretch, use the bathroom, etc.
- **Use your Calendar:** Include all essential login information saved in your Outlook Calendar event. It's easier than trying to track down an email 2 minutes before a call is set to start!
- **Leaving early:** If you need to leave early (or at the scheduled end time and the meeting is still going), consider what will disturb the meeting the least. If you can, wait for a pause in the conversation. Consider utilizing the chat function, if available, to alert other attendees that you are leaving and if you will return. (If you know you in advance that you will need to leave early, it can be helpful to state this at the beginning of the call.)
- **First Time? Be Early:** If you are using a meeting platform for the first time, be sure to allow extra time to work out any audio or microphone issues. Do the same if it is the first time you are using new hardware as well: new computer, new headphones, a new microphone, etc.

TROUBLESHOOTING

- **Fixing an Echo**
    - In GoToMeeting, look to see whose name shows up as "talking" when they are not actually saying anything. This is likely the person causing the echo. The person who is causing the echo may not hear it. Hopefully the person causing the echo can self-mute when they are not talking. If not, the meeting organizer may need to mute them.

USING VIDEO

- **Camera Placement:** Aim to place your camera in a location with a neutral background without unnecessary background movement or heavy backlighting. If you have multiple screens, it is helpful to place your webcam on the dominant screen. Position yourself directly in front of the camera rather than placing it at an angle.
- **Understanding Eye Contact:** Most cameras are located at the top of users' screens. This means that when it feels like you are making eye contact with another person, that person sees you looking down. You can create the illusion of eye contact by looking directly at your camera. It's probably easier to listen if you look at other peoples' videos, but looking at your camera will more effectively signal that you are listening and engaged.
- **Avoid Visual Distractions:** Now that you are visible to other meeting attendees, excessive movement can be distracting. Consider pausing your camera if you need to stretch or move around.

SCREEN SHARING

- **Close Any Confidential Windows:** It is best practice to close any and all apps or windows that you do not wish to share with other attendees. It is easy to accidentally share the wrong screen or open the wrong tab.

- **Confirm Screen Sharing:** It is helpful to confirm with participants that they are seeing your screen, and that you are indeed sharing what you intend to share.

SCHEDULING A VIRTUAL MEETING

- **Calendar Invites:** Use a calendar invite to inform attendees about where a meeting will be conducted. Include links or phone numbers needed to join the meeting. It may also be helpful to include a brief agenda.
- **Time Zones**: Be aware of where your attendees live. ICA staff and HMIS users range from Eastern Time to Alaska Time, where 9am Alaska Time is 1pm Eastern Time. (4 hours behind)

HOSTING A VIRTUAL MEETING

- **Attendance:** If you want people to introduce themselves and you can tell who is on the line, consider doing a roll call. It is very hard to take turns "popcorn style" on a virtual meeting without visual clues.
- **Tools:** Choose the right online meeting tool to ensure the running of the meeting is easier, faster and more collaborative.
- **Using Webcam:** Decide if video conferencing is necessary.
- **Test:** Test technology prior to meeting
- **Agenda:** Set an agenda and meeting guidelines.
- **Co-Presenters:** If there is a co-presenter, make sure to work out the details of format for meeting ahead of time.
- **Sharing documents:** Make sure you have any relevant documents, files or research available to share with attendees.
- **Recording:** Record the meeting if some are unable to attend because of a scheduling conflict.
- **Follow-up:** Online meeting follow-up and send out any minutes or action items to attendees, if applicable.

RESOURCES

"Best Practices for Virtual Participation in Meetings: Experiences from Synthesis Centers", Bulletin of the Ecological Society of America https://esajournals.onlinelibrary.wiley.com/doi/full/10.1002/bes2.1290

https://www.youtube.com/watch?v=DYu_bGbZiiQ&feature=emb_logo