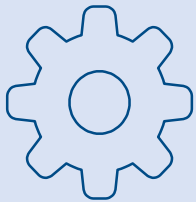




DeYoung Consulting Services Virtual Facilitation Tip Sheet

Virtual logistics



Plan logistics to run a smooth technology-based meeting

- Ideal meeting length is 60-90 minutes max.
- Be especially clear about meeting objectives.
- Assign a tech support person to handle logistics and technical snags. Check in beforehand to review expectations, e.g., how to communicate, timing, and handling participant questions.
- To save time, consider pre-recording small chunks of a presentation, such as a walk-through or tutorial.
- Encourage participants to join via their computer as opposed to their phone, if possible, since mobile app features may be limited.
- Send materials ahead of time, including slide presentations to follow along, and agenda with clear meeting objectives.
- Do a tech check prior to particularly important meetings or a meeting that uses new technology features.
- Use headsets to improve audio quality. Conduct a sound check to ensure your camera and microphone work well.
- Always have your camera on and, especially with smaller groups, ask participants to also turn their cameras on.
- Use two monitors if you can, so you will be able to see the meeting room and materials more easily.
- Assign hosts to breakout rooms. This is possible in WebEx, but not Zoom. In Zoom, the host can maneuver among breakout rooms.
- On Zoom, you have the option to apply backgrounds. In your settings you can apply a background from the options offered in Zoom, or you can access a graphic from your own files and use it as a background. This does not work with older computers. A green screen is required for older models that don't have a strong enough processor chip.
- In large meetings it is best to have all participants muted so that individuals are not talking over each other. People can unmute themselves when they wish to speak. In addition, take advantage of the "raising hand" for participants to indicate they would like to jump in the conversation.

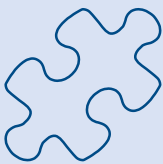


Engaging facilitation



Engage participants with good meeting structure and manage the flow

- Co-facilitation is a good way to split up work and come across as a team. Plan ahead who will facilitate which segments, how to pass the torch, and how to communicate with your partner during the meeting.
- Set the tone by leading off the meeting in an especially engaging way.
- Talk less. Let participants be as active or conversational as possible, checking in with them frequently. Try to engage participants every four minutes, using chat, agree/disagree, etc.
- Look at the camera or at top of your screen when speaking. Continue to glance at camera occasionally even when listening. Video can make people look bored or disinterested, so pay attention to your facial expressions.
- Consider following short presentations with individual reflection, so everyone won't try to talk at once.
- Allow silence, just as you might in person, to give participants time to reflect and learn.
- Explain to participants how they can and should engage throughout the meeting: "raising a hand," using chat, whether they should mute themselves, etc.
- Ask for participants' feedback to keep improving your virtual presence.

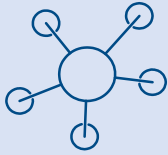


Use the right tools and activities to engage

- Make sure that the technology supports rather than drives the process. Use it only when it adds value.
- Tools to consider: virtual whiteboards that allow for drawing and collaborative editing (Google Slides, PowerPoint, AWW App); surveys (Google Forms, SurveyMonkey); and live polling (Mentimeter, Kahoot).
- Simplify engagement activities by using the chat function for Q&A, emojis, and polls. For example, consider using chat for introductions, for participants to reply to a question with one word or idea, or for participants to "park" their questions there, allowing the facilitator to select which to address first.
- Don't overload your meeting with too many materials. Reading a document on a screen may not be as productive as engaging with people's faces. Include videos and images to keep people's attention.
- Breakout rooms are good for small groups to discuss separately and come back to share, but use them wisely because they can be cumbersome.
- To help maintain attention, use "one breath feedback." This is a round of reflection in which each participant gets the chance to speak during just one breath. For most people that's around 20 to 25 seconds. (SessionLab)
- Use online energizers: <https://www.sessionlab.com/blog/online-energizers>



Specific tips for different types of meetings



Focus groups

- Consider inviting fewer participants than you would in person.
- Allow yourself extra time to prepare, as facilitating an online focus group may require even more preparation than usual.
- Keep it simple, to avoid excluding participants who may not have a particular type of software or hardware.
- Keep the conversation flowing to prevent dropouts.
- Consider having two facilitators to allow for a division of responsibilities and roles.
- Consider assigning a tech support person to respond quickly to impromptu questions, chats, and even technical issues. During virtual meetings it is more difficult to sense engagement or body language. Keeping the group on-track can be more challenging, and using a tech support person can help.
- Recording your online focus groups is important, as is transcribing each session for future reference.



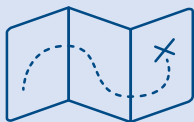
Interviews

- Try to focus on the camera instead of your screen, so that it appears as if you're speaking directly to the participant. Maintaining eye contact through a computer screen is challenging. Remember that taking long, detailed notes will require you to look away from the camera.



Visioning sessions

- Use asynchronous collaboration such as surveys to gather information and identify important topics. Use real-time collaboration for prioritization and decision making.
- Large group brainstorms work well for data gathering and small group brainstorms for building recommendations.



Retreats

- Change up methodology or activities approximately every 15 to 20 minutes. This is critical to ensure engagement in day-long or half-day retreats.
- Use 15 to 30 minute long small group breakouts for a portion of every hour throughout the day.
- Provide breaks every 90 minutes. Make sure all participants know the break times prior to the day of the retreat, especially lunch, so they can make necessary arrangements.
- Resist providing an option for participants to call in via phone, so as to encourage their participation via video. This avoids potentially unequal participation.



- Many participants may not have experience participating in daylong virtual retreats. Provide clear instructions, including tips for setting up the virtual workstation, staying comfortable throughout the day, optimizing the use of the technology, optional use of virtual backgrounds, materials participants will need, and food and beverage breaks.
- Use pre-workshop brainstorming online as a way to gather data and give yourself time to design the next steps.
- Staff the retreat with a facilitator, a host/tech person, and a scribe.
- Open the retreat with a review of the technology tools that will be used.
- Capture brainstorming in real-time with live, onscreen scribing.
- Pre-determine who will be in each breakout group to consider diversity, personalities and communication styles. Change the small groups assignments throughout the day so the same people are not always working together. Create smaller groups than you might in-person; 5-6 people per group works well.
- Consider identifying and training a member from each small group to be a small group facilitator. The quality of small group output is often dependent on having a great facilitator. Facilitators should be chosen and identified before the day of the retreat.

*Sources can be provided upon request

