

Planning for Effective Facilitation of Virtual Meetings



To plan a virtual meeting that fully and effectively engages stakeholders, imagine the meeting experience from the perspective of different participants: What will participants need to have and know prior to the meeting? What will participants need to be able to see, hear, and do during the meeting?

This checklist focuses on technical considerations to support the effectiveness of meeting organizers and leaders.

1. Set the meeting date and time.

- Allow enough time prior to the meeting to:
 - » Address procedural considerations (public notice, departmental reviews, etc.) and,
 - » Practice and plan.
- Set the length of the meeting in a way that sustains attention and supports active engagement:
 - » Build in breaks for participant refreshment and time to address distractions, and
 - » If possible, schedule multiple shorter meetings instead of one lengthy meeting.

2. Assemble your team.

Depending on the size of the meeting, the members of your team may vary, but at a minimum, you will need:

- Facilitator* – keeps the agenda flowing and the participants active. This team member should be comfortable with the technology but not responsible for monitoring its effectiveness.
- Technical manager* – keeps the virtual meeting platform functioning in support of the meeting activities. This team member will:
 - » Set up the meeting room and operate the platform tools,
 - » Operate behind the scenes during the meeting,
 - » Assist participants experiencing technical problems, and

- » Troubleshoot and address technical difficulties affecting meeting quality.
- Moderator* – watches the chat box for questions, comments, and requests for technical support.
- Presenter(s)* – delivers information through their preferred presentation tools. They should not be assigned other responsibilities, at least not during their presentation time.

3. Choose tools and activities based on meeting goals.

Let the meeting agenda determine what tools and activities will be used in the virtual meeting. For each agenda item, consider the following:

- How important is it to achieving the goals for the meeting? Allocate time accordingly.
- Use asynchronous activities (surveys or document reviews) to address some agenda items.
- For each agenda item, assign:
 - » Who will take the lead,
 - » How much time is allotted,
 - » What they want to “walk away” with from that time, and
 - » Tools and strategies to be used.
- Identify tools to support meeting activities. Platform tools may include:
 - » *Renaming* – Edit on-screen names to provide additional information (agency, role, etc.) or to group participants (by alphabetized labels) for convenience.
 - » *Annotation/Whiteboards* – Type, draw, or otherwise add to a white screen or over other images showing on the meeting screen.
 - » *Chat* – Enter text into the chat box to share with participants as a group or individually. Chat boxes can be useful or distracting. Consider the group and adjust chat settings accordingly.



Planning for Effective Facilitation of Virtual Meetings

3. Tools and activities *continued.*

- » *“In-room” automations* – Signal the host, presenters, and other participants by clicking on an icon to activate it. Use these instead of polling to take a quick pulse.
- » *Breakout rooms* – Virtually separate a large group into smaller ones to help participants effectively engage in discussion. If possible, set up the breakout rooms prior to a meeting. Breakout rooms can also be set up during the meeting. In either case, participants can be assigned or randomly divided.
- » *Polling* – These are in-meeting surveys used to get and share input. These surveys can be created prior to the meeting or in the moment.
- » *Sharing video and audio through the platform* – Play these through the virtual environment to optimize quality.
- Test links to videos in presentations prior to the meeting.
- Adjust the virtual meeting settings to ensure access to all necessary features but minimize distractions. Here are some recommendations:
 - » *Screen sharing* – Set this so that only the meeting hosts or co-hosts are able to share their screen so that all participants are viewing something together.
 - » *Waiting rooms* – Enable a waiting room so the host is able to admit expected participants or expel uninvited or disruptive participants.
 - » *Audio/video on or off* – Most systems now default to video off, audio on. “Mute all” is a useful tool to manage background noise.
 - » *What’s “on-screen”* – For presentations, anchor the presenter’s video so they are always seen. For active discussion, set so everyone appears on-screen at once.

Participants may also choose the style of viewing they prefer:

- “Speaker” view* – Highlight the person speaking at the moment.
- “Gallery” view* – Show all participants at once, regardless of who is speaking.

4. Practice makes perfect.

- Schedule a “dress rehearsal” the week before your meeting. Invite a few extra people to participate as audience members. Make sure the practice meeting settings match those of the scheduled meeting.
- Let people in and send people out to the waiting room if you have one.
- Have participants test using a passcode if you have one.
- Have participants test using different types of devices, including tablets and phones, if possible.
- Open and share the documents and media you will need to use during the meeting.
- Try out virtual meeting platform tools for participant input and engagement.
- Open and share external platforms/software you intend to use.

5. Read your reviews.

- Collect and use data to improve future meetings.
- Create and disseminate an after-meeting survey using a meeting platform survey tool, chat box, polling tool, or some other survey platform (such as SurveyMonkey).
- Save the chat and analyze comments to identify problems that arose during the meeting.
- Participants may call or email to share feedback independently.
- Ask specific questions about ease of access, navigation, and participation.
- Use participant feedback to improve future meetings.

The National Center for Systemic Improvement is funded by the U.S. Department of Education’s Office of Special Education Programs contract No. H326R190001. The views expressed herein do not necessarily represent the positions or policies of the U.S. Department of Education. No official endorsement by the U.S. Department of Education of any product, commodity, service, or enterprise mentioned on this website is intended or should be inferred. Perry Williams, Project Officer (2019-2024).