

Community Coalition Guide: Tips for Productive Virtual Meetings



COMMUNITY COALITIONS

Strategies for Successfully Transitioning Your In-person Meeting to a Virtual Forum

Virtual meetings are an effective and efficient way to keep moving ahead on community coalition initiatives when face-to-face meetings are not possible. This document summarizes tips about how to establish a virtual meeting forum, plan for the meeting, and a checklist you can use to successfully engage participants virtually. Taking the time to plan, practice, and establish guidelines for virtual meeting etiquette can make all the difference in ensuring your coalition can make measurable progress towards established goals.



Virtual Meeting Planning Tips for Meeting Planners & Leaders

Using Technology:

1. Select your technology platform(s) considering features, functionality, cost, and the ability of all meeting participants to access. Ensure you have a version of the tool that allows access to the features you require (some free versions limit time or functionality).
2. Determine if you are looking solely for a meeting platform or a broader communications strategy. Do you have a need to share or collaborate on files in-between meetings? If yes, identify a platform that allows those outside of your organization to access and download materials. Use the sharing platform to share materials for meetings instead of emailing large files to ensure that even those accessing on limited bandwidth (like phones) have access to materials.
3. Test your meeting platform prior to meetings, particularly with participants new to using the platform you have selected.



Meeting Preparation

- Consider the agenda and pre-meeting requests.** Back out to a suitable date to send the agenda and materials for the meeting – your attendees may need days or weeks to prepare for the meeting based on what you are hoping to accomplish. Provide all background information and links to resources or materials that will be referenced during the meeting in one location.
- Consider using an online collaboration form.** Place all meeting materials within one place (like Google Drive, Dropbox, or Box), and share a link to access those files in the body of the meeting invitation or email.

- Build in opportunities for engagement.** Throughout the meeting, pause and ask questions or poll the group to ensure everyone is tracking along with you.
- Start the meeting at least five minutes prior to the official start time.** If you are the host of the meeting, you are able to greet your guests as they arrive.
- Plan and communicate your method for enabling participant engagement even when they have to miss a meeting.** Utilize meeting recording functionality, distribute robust minutes and/or build a rolling list of shared resource links into your meeting agenda template.
- Ensure that the meeting summary notes and action items are distributed timely (within 24 hours).** You can always follow up with detailed minutes later.



Engaging Participants/Attendees in a Virtual Forum

1. Acknowledge that multi-tasking will occur and set your participants up for success. Summarize key decisions during the meeting wherever possible to secure ongoing engagement and support (especially when the discussion has taken a while). For example, "It sounds like we've all just agreed to move ahead with the proposed foodbank program in Adams County." When there are important parts of the discussion that require a specific individual to weigh in, briefly summarize the ask of the individual with suitable background. For example, "Sue, Marcus just shared his idea for engaging the local department of public health to assist with distribution of the foodbank materials for the folks in Adams County. Do you have a contact we can work with directly on this?"
2. Make sure the meeting has a manageable number of participants for active interaction and the right people are at the table. Ensure that the meeting purpose is established at the start of the meeting, and encourage those that do not feel that it is important for them to attend to reclaim the time.
3. Lead with enthusiasm for the work, stay focused, and keep the agenda front and center. Ground the meeting attendees with the agenda and affirm the topics that have already been covered before moving to the next topic.
4. Maximize technology to interact with participants – use polls, chat features, white boards, and round robins to ask for individual input on a specific question.
5. Be aware of how cultural differences and perceived perceptions of authority may affect participation. Be intentional about creating a safe environment for everyone to speak up.



Tips for Meeting Attendees

Please feel free to include these instructions for attendees in your next communication.

The Courteous and Prepared Meeting Attendee Checklist:

- Review the materials prior to the meeting.
- Use video, if possible, so that other meeting attendees are able to see you.
- Share the stage, prepare your thoughts, and share quickly. Allow others to weigh in before you move to another topic.

- When working remotely, consider your surroundings. Plan to have activities for children or pets, dress appropriately for the meeting purpose and audience, and be aware of posters, pictures, or the room that is in the field of view. Dress appropriately for the meeting purpose and audience.
- Make friends with the mute button! Use the mute button when you are not speaking to ensure that your background noise doesn't impact the audio. Muting your microphone when you're not speaking gives other participants the ability to chime in and share their thoughts without the distraction or frustration that comes with audio feedback. It is also important to use if you plan to type notes during the meeting. The internal microphone may pick up the keyboard noise and impact other's ability to hear.
- Test your system ahead of the meeting to make sure that you have the correct plug-ins and configurations. Most meeting platforms have a "test a meeting" option. Use the time to set up the positioning of your camera so you are able to look at the camera and view materials on the screen at the same time comfortably during the meeting. This will result in eye contact with the other participants).
- Join the meeting on time and announce yourself to the host.
- Use attentive body language: Sit up straight, don't make big extraneous movements, and don't let your eyes wander too much. Look directly at your camera instead of your screen when speaking to other virtual meeting attendees.
- Make yourself comfortable. Have a little something to eat before the meeting and have a drink on hand during the meeting. Limit breaks, and if you take a comfort break, let the host know.



Resource Toolbox:

[6 Steps to Run a Productive Virtual Meeting with Templates and Examples | Wild Apricot Blog](#)

[Designing a Distraction-Proof Virtual Meeting](#)