

## Preparation

1. Write down the meeting's purpose, deliverables, and goals.
2. Create a list of probable issues and corresponding solutions.
3. Determine delivery methods – lectures, videos, exercises, small group activities, and/or individual assignments.
4. Assign roles/responsibilities for host/facilitators.
5. Develop a list of ground rules for each session.
6. Make a minute by minute agenda.
7. Prepare a list of participants and their locations for roll call, and preferred method of communication during the session, e.g., email or phone number, in case you need to reach out during the session.
8. Establish a method for round robin checks (i.e. determine order of calling on people to speak for each specific discussion/agenda point).
9. Establish method for reaching consensus (e.g. voting with polls)
10. Develop and distribute the meeting notice and session agenda(s).
11. Hold preliminary discussions with key stakeholders before first session.
12. Set up virtual meeting room (e.g. prepare slides, polls, whiteboards, and/or break out rooms).
13. Prepare a fallback plan for “audio only” in case of technology glitches.
14. Hold a dry run to test audio and video, and software.
15. Prepare the session leader's opening remarks.
16. Send finalized agenda, prereading material, video conference link, and other relevant information to participants at a strategic time, at least a day in advance.
17. Send a meeting reminder the day before.
18. Hold a 30-minute Webinar to introduce any new platforms to your audience.

## Starting the Virtual Session

1. Turn off all notifications, put cell phones on silent, and close out any programs you don't need.
2. Have a checklist of names, locations, and cell phone numbers in front of you.
3. Start the meeting on time.
4. Deliver the opening remarks.
5. Greet participants when they come onto the platform and use non-work-related check ins.
6. Engage all participants (i.e., make sure everyone shares how they are doing).
7. Confirm the agenda.
8. Set expectations.
9. Review the ground rules and get acceptance from the group.
10. Review the parking lot instructions.

## Running the Virtual Session

1. Show people what software we are going to use on PowerPoint (e.g. LMS, Zoom, break-out room, Chat, Poll, Miro). And ask people to enter in chat box that they understand.
2. Have an engagement activity (e.g. Chat function, poll questions) every 10-15 minutes.
3. Use round robins (From above, Preparation Step 8) to ensure everybody participates and contributes.
4. Use redirection questions to keep the discussion on track.
5. Get agreement on problems/issues before getting agreement on solutions.
6. Encourage collaborative problem-solving using tools like Miro.
7. Summarize after each big discussion to ensure consensus before moving forward.
8. Summarize the day's activities -- review all issues, decisions, and actions before closing.
9. Ask each participant for their comments on the session.