A Checklist for Hosting Successful Virtual Meetings
Centralina Council of Governments Planning Department

As CCOG and many other organizations adapt to changes from COVID-19, we must improve our use of virtual meeting technology. We have developed a helpful checklist to host virtual meetings, making them as stress-free and valuable as possible to staff, officials, and our residents.

Similar to in-person meetings, virtual meetings require set up, break down, and designation of assigned duties. However, virtual meetings require additional steps and procedures to ensure that they run smoothly. It is important to know what should be done, and who will be doing these steps that occur, during meeting, and post-meeting. Below is a checklist of necessary activities to set up and run a successful, lower stress virtual meeting.

PRE-MEETING

Step 1: Pick the Virtual Meeting Platform

Identify the meeting purpose and outcomes needed. (see matrix)

Only use the technology needed.

Assign roles to staff based on technology and complexity of the meeting (presenter, manager of software, note taker, question/comment tracker, issue fixer, time tracker, etc.)

PRE-MEETING

Step 2: Make an Agenda and Get the Word out

Develop the meeting agenda (including a detailed internal agenda and a public facing agenda)

Develop the presentation/ meeting slide deck

Send out invitations to attendees or post as required

PRE-MEETING

Step 3: Prepare and Practice Technology, Equipment & Staff

Setting up meeting checklist (software to use, settings to adjust, links, how to share, where to share, who to send to, how to make others presenters or panelists)

Instructions/procedures to cover with board members, staff, and public (most likely different things depending on audience)

Test equipment and functions (switching screens, microphone volumes, switching waiting rooms and breakout meetings) with board members/staff who are playing an active role

DURING MEETING

Step 4: Managing the Meeting

Provide a visual agenda or guidelines in a chat

Rely on staff to perform assigned roles

Speak slower & enunciate more than normal

Identify yourself when speaking

POST-MEETING

Step 5: Completion of Meeting

Save and share meeting notes for official record

Follow-up with attendees, including sharing any files discussed in the meeting

Save attendance for official record

Make note of technical issues to be aware of for future meetings

During the meeting, it is advised that a minimum of **three** people be tasked with conducting the proceedings, but this number may increase relative to the technology used, size and significance of each meeting.

Presenter Role May Include:

In order to have a presentation with the fewest interruptions possible, it is advised that the main person presenting material is not responsible for anything other than presenting, switching their own screen, and introducinswitching to the next presenter (if applicable). Pauses in a presentation to fix technical issues or tracking comments can lead to loss of focus, confusion in the audience, and may cause the meeting to go over its allotted time.

1. Covering guidelines for the meeting, such as:

    Stating names before speaking

    When comments will be addressed and for how long

    When the meeting will conclude

    How long each presenter has to present

    Checking that people are aware of their assigned roles and duties

2. Being prepared to start the meeting with an introduction of himself/herself, which may also include stating who else will be presenting

3. Having access to and being prepared to share their screen for the presentation

4. Knowing how to stop sharing screen when presentation is complete

5. If there isn't a time keeper, being aware of and keeping presenters and the meeting on time

6. Being aware of the next presenter if applicable

7. Having a closing slide and contact information available

8. Being available for questions which may be allotted at a different time from their presentation, such as a question and answer segment at the end of the meeting

Note Taker Role May Include:

Depending on the detail of notes taken, the person taking minutes should not be tasked with other duties so as to not miss anything important. If note taking is minimal or an A/V recording of the meeting will be used to supplement the notes, then additional duties may be assigned such as tracking comments or fixing technical issues.

1. Being aware if notes need to be comprehensive or minimal

2. Making the notes available for those who need them, which means they may need to be digital

3. Being available for the entire meeting

4. Fixing shorthand or abbreviations after the meeting

5. Being aware of whether or not a session is getting recorded

Technology Manager Role May Include:

1. Designate a technology support person, who understands the roles of the Technology Manager and can assist in case multiple issues arise at the same time

2. Controlling who has access to presenter mode and screen sharing

3. Establish and make participants aware of voting procedures if applicable

4. Making sure the meeting is getting recorded if applicable

5. Being available for the entire meeting, including set up and post-meeting duties

6. Monitoring who is in the Waiting Room, and when they will be allowed to enter the meeting

7. Being aware of those who may have difficulty entering the meeting (who may try to contact via email or phone)

8. Monitoring for potential technical issues

9. Transitioning presenter access to other presenters when one concludes

10. Being aware of software features that may need to be accessed

11. Keeping track of who needs to be unmuted/muted and when

Public Comment/Question Monitor Role May Include:

Depending on the size of the meeting or predicted involvement of attendees, tracking comments may require someone's sole focus. Those conducting the meeting should be aware of possible software and technical issues, but it may be best to have one person designated for this role.

1. Knowing when comments and questions are going to be addressed

2. Making it known at the start of the meeting how questions should be asked, i.e. the chat function

3. Tracking which comments come in first, and by whom

4. Monitoring the appropriateness and the relevancy of questions and answers

5. Monitoring the time during which questions are being asked and answered so the meeting does not go over

6. Making sure presenters are aware that they have questions to address

7. Making sure all questions get addressed to the best of their ability in the given time

Features for software vary due to different prices and packages. Some software requires the use of apps to have additional features. This table breaks down which features are compatible with selected virtual meeting software, and the functions used to get to them. It is up-to-date as of 4/15/2020, however software updates frequently and may change from what is listed.

Disclaimer: This is by no means a comprehensive list of the services offered by the listed virtual platforms. This is simply a matrix of useful virtual meeting features based off of what CCOG has found through internet searches, and where in the sofware you can find those features. Please visit individual platform websites for a the most accurate and up-to-date information regarding offered features. This is for information purposes only. CCOG does not endorse any of these platforms.

These matrix features are intended for virtual meetings. Other needs, such as data collection, may arise. Listed are useful tools that should be explored for data collection:

1. Survey Monkey
2. MindMixer
3. MetroQuest
4. ArcGIS online

Translating In-Person Meeting Activities to Virtual Meeting Abilities

We know that many activities typical of an in-person meeting or event are challenging to pull off in a virtual format. With that in mind, Centralina Planning staff identified common activities of in-person events, and how to use a virtual meeting software including the features to create a digital experience.

	Zoom	GoTo Meeting	WebEx	Skype for Business	Google Hangouts	Microsoft Teams
Breakout Rooms For Group Discussion	Yes -Breakout room	Yes -Activities	Yes -Breakout session assignment settings	No	No	No
Back and Forth Engagement	Yes -Multi share	Yes -Q&A	No	Yes -Q&A	No	No
Recording Minutes	Yes -Cloud recording	Yes -Recording	Yes -Network based recording -Local recording	Yes -Start recording	Yes (G Suite subscribers only) -Record	Yes -Start recording
Identifying Features in a Presentation (i.e. on a map)	Yes -Annotate	Yes -Pen tool	Yes -Share a document	Yes -Whiteboard	No	No
Sharing Presentation Material	Yes -Screen share -Multi share	Yes -Screen share	Yes -Screen share	Yes -Present desktop -Present programs	Yes -Screen share	Yes -Screen share
File Sharing	Yes -Chat	Yes -Materials	Yes -File transfer	Yes -Add attachment (less than 30mb)	Yes -Chat -Google Docs	Yes -Files -Chat
Polling/Survey Responses	Yes -Polling	Yes -Meeting history	Yes -Manage Panels	Yes -Poll	Yes (G Suite Subscribers only) -@Polly	No (only through other apps)
Drawing Tools for Annotating	Yes -Annotate -Whiteboard	Yes -Pen tool	Yes -New whiteboard	Yes -Whiteboard	No (only through other apps)	No (only through other apps)
Tracking Attendance	No	Yes -Attendee report	Yes -My reports	Yes -Call history	No	No
Registration	Yes -Edit "My Meetings"	Yes -Share in "My Webinars"	Yes -Require attendee registration	No	No	No
Meeting Invitation	Yes -Invite	Yes -Invite	Yes -Add guest	Yes -Meeting invite	Yes -Send invite	Yes -Schedule a meeting
Group Editing of Materials	No	Yes -Annotate	Yes -Share a document/ whiteboard	No	No (only in Google Drive)	Yes -"More Options" in files