Virtual Meetings Best Practices

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Wheelhouse Group
GUIDING BUSINESS AND TECHNOLOGY CHANGE

Agenda

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Common Meeting Types

Small Team	Large Team	Single Presenter	Multiple Presenters	Information Gathering	Group Collaboration
Increasing Complexity					
• Basic platform	• Basic platform • Dial-in • Materials in Advance	• Better platform • Dial-in • Materials in Advance • Recording • Captioner • Transcripts • After Meeting Materials • Participant Management	• Better platform • Dial-in • Materials in Advance • Recording • Captioner • Transcripts • After Meeting Materials • Participant Management • Pre-event coordination	• Better platform • Dial-in • Materials in Advance • Recording • Captioner • Transcripts • After Meeting Materials • Participant Management • Pre-event coordination • Polls / survey capabilities	• Better platform • Dial-in • Materials in Advance • Recording • Captioner • Transcripts • After Meeting Materials • Participant Management • Pre-event coordination • Polls / survey capabilities • White boards • Breakout rooms

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Common Government Platforms

	Adobe Connect	Cisco Webex	Zoom Pro	Google Meet	MS Teams	YouTube Live
Software Required	Yes	Yes	No	No	Yes	No
Dial-In Options	Yes	Yes	Yes	Yes	No	No
Government Approved	Yes	Yes	No	No	No	Yes
Optimized for Accessibility	Yes	No	No	No	No	No
Maximum Participants	1500	1000	300	250	250	Unlimited
Other Considerations	• Not up-to-date • Layout issues • Audio delays • Not good on Mozilla	• Banned at a few agencies	• New security concerns	• Participant management not available • Distracting join noises • Gmail sign-in required • No polling or breakouts	• Bandwidth issues • No dial-in options	• Only one presenter • No co-hosting features • No polling or breakouts

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Meeting Basics

Establish Roles

Host(s)
- Sets up the meeting and manages the platform
- Controls participant discussions (mute/unmute)
- Reviews pre-event checklist with presenter(s)
- Schedules and holds tech-checks or dry runs

Support
(or co-host)
- Manages the chat / participant discussions
- Captures questions and feeds back to presenter
- Monitors email for inquiries / technical issues

Presenter(s)
- Prepares slides and talking points
- Advances slides
- Responds to questions

Captioner
- Captures the exact words of the presenter or others speaking
- Helps support accessibility needs of the stakeholders

Facilitators
- Manages breakout rooms
- Captures key notes on the discussions

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Pre-Event Checklist

- Makes sure you don't forget minor steps

- Confirms everyone knows their roles

- Minimizes distractions

- Improves accessibility

- Increases chat engagement

✓ Confirm platform settings

✓ Send slides in advance to improve accessibility

✓ Assign roles

✓ Remind presenter to repeat questions and describe slide visuals

✓ Turn off phones or notifications

✓ Close all unnecessary windows

✓ Capture links to content that they might mention (to put into chat)

✓ Ask if they want a countdown to manage time

✓ Run through the slides quickly (helps cache the images)

✓ Open captioning link to make sure captioner is present

✓ Remind participants that they will be recorded

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Security Concerns

Zoom Safety Usage

The following settings will ensure that your Zoom meeting is secure.

Zoom Settings

Under the settings section, turn on the following (everything else can remain off):

Schedule Meeting Section
- Only authenticated users can join meetings from Web client
- Require a password when scheduling new meetings
- Require a password for instant meetings
- Require a password for Personal Meeting ID (PMI): All meetings using PMI
- Require password for participants joining by phone
- Mute participants upon entry

Meeting Section (Basic)
- Screen sharing > Who can share? Host only

Meeting Section (Advanced)
- Waiting Room

Setting Up a Meeting

When creating a new meeting, complete the first two sections with the accurate event information (i.e topic, date, time). The below sections should be selected:

Meeting ID
- Check generate automatically

Meeting Password:
- Check require meeting password and use generated password

Video:
- Host and participant video turned off

Meeting Options
- Check must participants upon entry
- Check enable waiting room

https://bit.ly/3548Tj3

- Check your settings before you create/start a meeting

- Never use a personal meeting ID or standard link

- Schedule individual calls for each meeting

- Add a meeting password (LastPass Password Generator)

- Pick a platform that allows you to manage participants

- Use a "gating" tool like Eventbrite, instead of direct calendar invites

- Have a plan for any misconduct during the meeting with an assigned person to address it

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Moderating the Chat / Participants

- Prepare scripted responses
  - Welcome messages
  - Closing messages
  - Request to mute/unmute
  - How to ask questions

- Support the conversation
  - Drop in relevant links mentioned (or even links to a script and materials to improve accessibility)
  - Remind people of anything sent via email (e.g., copy of an agenda)
  - Plan out conversations
  - Provide directions for any activities
  - Plan activities for breaks

- Capture questions
  - Send a list of questions to the presenter, when appropriate
  - Consider capturing responses for future distribution

Advanced Considerations

Breakout Rooms

- Platform concerns
  - Assigning specific people to rooms is not always possible
  - Not all platforms have breakout room capabilities
- Attendees per room
  - Keep it less than 12 per room and allow for at least 2 mins of talk time per person
  - Each room needs a facilitator, plus possibly a captioner and notetaker/chat support
  - Assign a person to stay in the main room and support trouble-shooting for anyone not able to enter a room
- Set up
  - Put all directions or instructions in the chat (e.g., WWWWH)
  - Create a script for the facilitator to lead the conversation
  - Try to pop into each room to hear some of the conversation
  - Give clear directions on when to return to the main room
  - Consider having an alternative means to chat, text or ping your facilitators

Collaboration Boards

- Platform built-in options
  - Whiteboards
  - Annotations (on presentations)

- Third-party boards
  - Mural.co
  - Miro.com

- Set up
  - Review available templates in the platform
  - Spend the time before the session to customize and prepopulate some of the template or board for your needs
  - Consider sending sign-up instructions or any questions to consider with the event invite
  - Pre-populate or paste instructions on the board
  - Provide enough illustrative items for participants to copy and manipulate them without impacting others

Survey / Polls

- Platform concerns
    - Not all platforms have polling features
    - Most polls need to be created once the meeting is live, so allow for appropriate time to set up

- Set up
    - Craft your questions with possible responses before the event
    - Decide if/when the participants will see the results

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Sharing Your Outcome

- Post Your Video Online
  - YouTube Channel
  - Custom Website

- Distribute Your Presentation
  - PowerPoint files (compress large images to reduce file size)
  - PDF files (usually reduce the size and keep format consistent across users)
  - SlideShare (now part of LinkedIn)

- Send Other Content
  - Collaboration boards
  - Questions and responses
  - Transcripts
  - Articles summarizing the results

The Back Up Plan

- What do you do if someone can't make it?
  - What happens if a key person (e.g., presenter or facilitator) cancels?
  - Can someone access the emails or platform if you host is sick?

- What happens if your technology fails?
  - Do you have an alternative technology platform?
  - Have you sent out the materials or prepared them for distribution to discuss via phone?

- Have you planned for the unknown?
  - Do you have messages prepared for needing to end/pause the conversation?
  - Can you contact your attendees if you need to cancel last minute?

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Accessibility Considerations

Presentations

www.Section508.gov/create

- Use MS PowerPoint built-in accessibility checker
  (top ribbon> Review> Check Accessibility)

- Review Section508.gov/create resources

- Ask the Agency Accessibility team to review

- Make sure to save as PDF or do a second check on the file after converting it to PDF

- Train or remind your presenters to use accessible language during a presentation

- Don't forget ALT text for images or videos

Captioning

Federal Relay Conference Captioning Service Request

Join Now

Important Notice

FEDRCC IS ONLY AVAILABLE FOR USE BY ACTIVE FEDERAL EMPLOYEES.
Federal grantees are not authorized to request for FedRCC service. However, Federal agencies may choose to sponsor their grantees and the ordering for FedRCC service would be from the agency, not the grantees.

Contact Information

First Name *

Last Name *

Email Address (Required) *

Enter only one email address. Note: only emails ending with .mil , .gov , gallaudet.edu , redcross.org, si.edu or .fed.us will be accepted.

www.SprintRelay.com/federal

PRO TIP: If the event did not have a captioner present, upload the recording into YouTube Studio and automated captioning will be provided. You just need to thoroughly edit it before distribution.

- **Federal Relay** is the preferred federal government captioning service

- Complete the **form** (with your government email) to request a captioner to attend your event

- Review the email instructions to find the captioner on the day of the event

- Share the link to captioning in the meeting invite and chat

- Check to make sure your captioner attends (minimum of 15 mins early)

- Save the transcript before closing the captioning window

- Review and edit the transcript before distribution

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Other Resources

www.PEATWorks.org/futureofwork/a11y/telework

- Check out the checklist of necessary steps

- Review the basic tips on creating accessible content

- Read the details of available accessibility options when picking the right platform

PEAT Key Resources
- "Checklist for an Accessible Virtual Meeting & Presentation"
- "Digital Accessibility Basics" (Basic tips on creating accessible content)
- "How to Pick an Accessible Virtual Meeting Platform"
- PEAT's Telework & Accessibility Resources