

Protocol for Virtual Meetings

Scheduling:

1. Verify the best time for most of your key participating members if possible. If this is not possible, verify the time with the leadership. Others will participate as they are able.
2. Identify a secondary contact person for a major or large meeting
 - a. They will monitor attendance
 - b. assist participants having connection issues
 - c. monitor chat features
 - d. identify “raised hands”
 - e. keep an eye on the time
3. Prepare your agenda and documents in advance whenever possible.
4. Set up the call using the preferred video conference platform.

NOTE: You will see a lot of redundancy here. It is necessary as people see and register information in different ways. The more ways you can communicate the clearer the message to the greater group.

5. In the Subject line of the invitation include the following as not everyone gets this in a calendar link.
 - a. What: Call to discuss XXX. (Joe Smith is scheduling a Zoom call is not enough. The recipient should not have to dig into the message to try to figure out why you want a call.)
 - b. When: Day (Tues), Month, Date (if no automatic calendar link, the recipient can copy and paste into the calendar themselves.)
 - c. Time: **Time and Zone associated with that time.** If possible, provide as many time zones as possible. Ex: 3 pm EST; 2 pm CST; 1 pm MST; 12 pm (noon) PST
6. In the body of the invite you will have the call information.
 - a. **ABOVE** the call information, customize your message. Joe Smith invites you to a meeting to discuss XXXX. Attached is the agenda and relevant documents we will be referring to. **If you have difficulty connecting to the meeting, please contact XXXXX at XX@XXXXX as they will be assisting while I facilitate.** (This is very important to note this in bold and red to stand out)
 - b. Attach an agenda or plan. This is especially important. People who call in without video will need this for reference.
 - c. Attach all relevant documents or send them under a separate email. Again, people who do not have video sharing capabilities will need these for reference.
 - d. Read through your text, verify your attachments.
7. Identify your invite recipients. It is often a good idea to send the invite only to yourself. From there you can do a final review and see how it will look. Make any adjustments needed and forward to your invitees.

NOTE: When using the ASABE Forums to send an invite to the full committee you MUST send to yourself and forward from there through the Forum Listserv for the best coverage.

8. Prepare an email to be sent to the same group of recipients.
 - a. Copy the subject and all the relevant text including the call information and the attachments.

- b. At the beginning, note include the following statement: “This is a duplicate invitation in case you did not receive the calendar invite, delete if not needed.”
- c. Attach an icalendar link if you are able. Google the directions relating to your calendar software for directions.
- d. Send this email to your group directly.

Hosting a meeting

1. Meeting preparation – a headset and use of computer audio is best for hearing and voice on a virtual meeting.
2. Plan your schedule with 30 minutes prior to the meeting for set up if possible, especially if this is a first time or important meeting. For ASABE AIM, you may not be able to enter your meeting until your appointed time due to a meeting in progress. You can prep your documents in advance.
3. Preparation.
 - a. Close all unnecessary applications on your computer to minimize distractions. This includes email if you receive screen notifications. If closing your email it is a good idea to have a secondary email notification source such as phone or tablet available unless you have made arrangement for an assistant (Scheduling #6 a). Participants who cannot access the meeting will send emails requesting assistance.
 - b. Locate, open, size and identify all your necessary documents for the meeting one at a time.
 - i. Open the document
 - ii. Minimize/collapse the ribbon of tools at the top (right click anywhere on the ribbon, select “Collapse ribbon”) to maximize your screen.
 - iii. Maximize the size of your document as some members may be viewing on tablets and phone screens.
 - iv. Once your document is positioned on the screen, minimize it in your tray. DO NOT CLOSE IT. By minimizing it, when you select it you will find it to maintain the formatting for viewing that you just set up. Try it to verify.
 - v. Note which documents you have prepared and order them in your tray as you wish for ease of access.
 - c. To show two documents on the screen at the same time, open both, resize them to each fit half of the screen with the greatest magnification possible.
 - i. If you have a more current version of Word and a single monitor you should be able to snap one document to the left and one to the right and they will automatically size.
 - ii. If you have an older version or more than one monitor, this needs to be done manually by adjusting size and magnification as you are able. Members can zoom in if needed on their personal screens to increase magnification. You may need to remind them of this.
 - iii. As noted above, once you have your document set for viewing, even with a split screen situation, minimize and maximize should automatically present them as set. Verify this.
 - d. Be aware of your background on screen, minimize distractions for your viewers by moving items you do not wish to share out of range. Also be aware of sounds in your

space, children, dogs, family noise if at home or loud co-workers and ringing phones if at your office and do your best to minimize these during your meeting time.

Starting your meeting

1. Open your meeting at least 10 minutes prior to the meeting start, especially for a large and/or important meeting if you are able. See note above about ASABE AIM meetings.
 - a. This gives you the opportunity to check your audio and video access
 - b. Set up your welcome screen.
 - i. You may want to have a single document on the screen welcoming people with the direction to turn on their video if possible until the meeting starts so people can connect names and faces.



Welcome
template.docx
 - ii. All video should be turned off at the start of the meeting with the possible exception of the facilitator and assistant.
 - iii. The welcome screen should also note that all audio is to be muted at the start of the meeting unless the person is recognized to speak
 - iv. Note that the assistant will be monitoring the “Raised Hand” function and Chat to assist with controlling the communication.
 - c. Share your screen with the Welcome template or another document so participants can verify they are in the correct meeting. It is preferable to share your screen than just to share a document if you are the host or facilitator. If your documents are prepped as suggested, you just need to open and close what you need as you already have that set up.
 - d. Be mindful of your conversations as people are joining. Keep conversation to a minimal as a host, welcoming people as they join. This will make your meeting more personal for them.
 - e. People will be logging on at this time to check their audio and video access.
 - f. Your assistant should be available and taking notes on all who are joining.
 - i. For a small group of 10 or less this is not a big job.
 - ii. For a large group, once people near the login time it can be overwhelming for a single facilitator as you are trying to recognize and welcome people to the meeting.
 - iii. Assist the facilitator with monitoring the communications as noted above.

Conducting your meeting

2. Provide at least 5 minutes into your meeting time for logging in and people to generally greet each other. To begin your meeting, welcome participants and identify your meeting verbally.
 - a. Have the assistant take a rollcall from the participant list, updating names as needed
 - b. Ask all participants to mute themselves and to turn off their video.
 - c. Remind them to locate the “Raised hand” option and to use it to speak.
 - d. Pull down the welcome template and call up your agenda or other documents
 - e. Always identify verbally what you are showing on your screen for anyone who is not on video but only on the phone so they can access their downloaded versions.

3. The assistant should call attention to anyone who has raised their hand to unmute or to messages in the chat box.
4. Consideration should be made for discussion with the facilitator taking the lead on keeping the discussion focused on the agenda topics. If the topic is not in the agenda and was not added at the start, it should not be brought into discussion unless there is time at the end.
5. To “vote” or express approval, it may be best to request those who disapprove the action to raise their hand or enter comments in the chat. This controls the identification. As all are virtual, this may be considered as “voting in person” provided the attendee is identified in advance.

Closing your meeting

6. Above all, be aware of the allotted time for your meeting and be respectful of ending at the appointed time.
7. Thank your attendees and state specifically that the meeting has ended.
8. Prepare and send out meeting notes/minutes as soon as possible to keep people who were not able to attend updated.