

Virtual Community Engagement Guide

A Toolkit for Hosting Online Community Engagement and Meetings in Rural, Remote, and Indigenous Communities

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With Support from Nature United

Introduction

Hosting effective online community events and meetings in rural, remote, and Indigenous Communities can be challenging. From tools and technology to logistics and engagement, this toolkit was created to help you address some of the most common virtual meeting barriers and opportunities.

This toolkit was prepared by Amanda Sheedy, with support from Nature United, and in collaboration with a small group of Indigenous Community-based leaders interested in learning and brainstorming how to better engage their communities virtually during the COVID-19 pandemic. The toolkit is the result of three workshops that drew on the wisdom and experience of participants. These tools are offered as suggestions and support for your work and should not be considered a prescription for how to host your meetings or community engagement. They are offered humbly as part of the ongoing journey we are all on as we learn to work online together.

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Section 1: Wise Practices for Online Indigenous-led Community Engagement and Meetings

Wise Practice #1: Connect to land and culture

When Indigenous Nations come together in the community for any kind of meeting, it can be a chance to practice culture and reinforce identity. During in-person meetings, communities might choose to host a workshop on the land, integrating traditional activities such as art, language learning and ceremony. But how do communities connect to land and culture when people are all in separate places looking at a computer screen? Here are some ideas:

- **Bring your language into the meeting** especially during openings through ceremony, prayers, welcoming and songs.
- **Involve elders and knowledge holders as much as possible.** Acknowledge them and provide a special role for them during the meeting. Seek their advice before the meeting about wise traditional practices for the meeting. Ensure they have support to navigate the technology so they can fully participate.
- **Share maps or other images of the land.** Consider sharing pictures or videos of the land as well as maps with traditional place names. You could do this during breaks, openings or closings. Encourage people to change their video background to a picture of their territory. Before the meeting, encourage people to share videos of themselves on the land.
- **Create space to share land and culture.** As part of ice-breakers or other designated times in the meeting, ask participants to bring something from the land, or a picture of the land, and share it with others.
- **Do cultural activities together.** It is still possible to do cultural activities as part of a virtual meeting and to weave these into other agenda items. Honour deaths and offer prayers for those suffering.
- **Share cultural wisdom about the season.** Consider weaving knowledge about the current season, moon cycle, etc., and its significance, into your agenda.
- **Hold part of the meeting on the land.** When it's safe to do so, hold meetings outside in your community with physical distancing. If that is not possible, you could encourage people to sit or walk outside during some parts of the agenda.



Wise Practice #2: Create a caring, healing, and connected atmosphere

Part of an Indigenous Community's work can be to support each other. Meetings are a chance for people to care for each other, heal from the past, and connect to one another. This is an important part of decolonizing communities and how we work together. While some people know how to do this in face-to-face meetings, it is hard to know how to create a healing, caring atmosphere in an online environment. Here are some ideas:

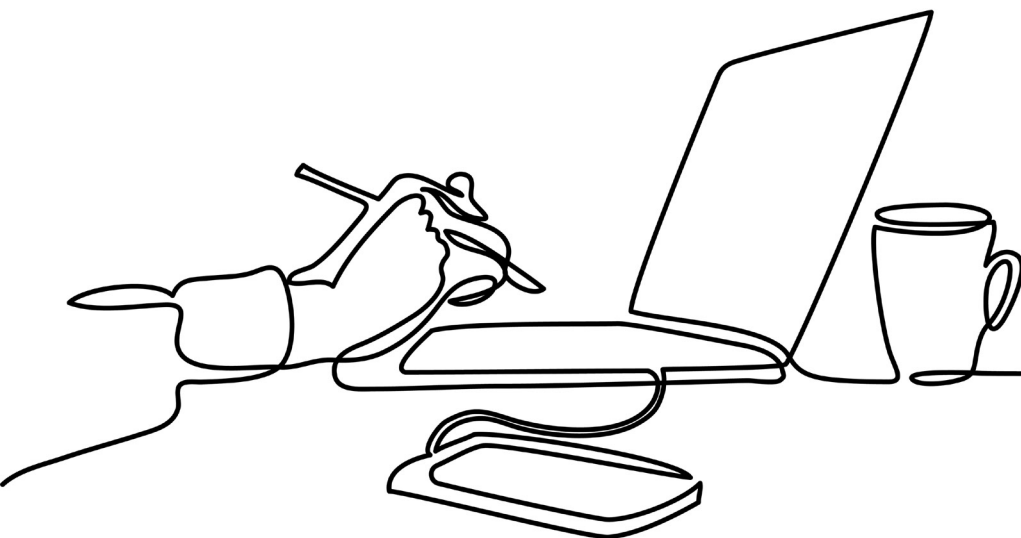
- **Adopt a trauma-informed approach to your meetings by:**
 - Including lots of breaks.
 - Facilitating sensitively.
 - Making resource people, such as elders or councilors, available to support participants one-on-one in a breakout room.
 - Acknowledging where people are at, or giving participants time to share their healing journey in order to inspire others.
 - Allowing space for emotions to be expressed, including allowing for flexibility in the agenda for this to happen.
- **Plan breaks for care and rejuvenation.** There are some great options for making breaks more than a chance to grab a tea and visit the bathroom. Some ideas include:
 - Have a mix of 'guided' breaks (like stretching and moving together led by someone, or a fun ice-breaker) and 'step away' breaks (where people turn off their screens and microphones).
 - Send a package in the mail with treats to enjoy together (ie: tea, chocolate, etc.).
 - Do a cultural activity together, such as beading.
- **Provide space, time, and options for people to share and participate.** While every meeting can have time for discussion, participants should not feel pressure to participate. Provide options for participating such as sending an email or letter, sharing in the chat, adding ideas to a shared document, calling the meeting organizer, etc.
- **Provide opportunities for people to connect.** This could include small group breakouts or even two people breakouts. Provide people with questions for the breakouts that draw on their experience. Another option for breakout groups is to provide no questions or facilitation. This creates time for folks to connect without the pressure to do something specific.
- **Facilitate with kindness, patience, and compassion.** The facilitator or host can set the tone from the beginning of the meeting by naming the intention to create a meeting for caring and healing. It might be useful to ask the group to name some guidelines for how to ensure this happens during the meeting. Depending on the meeting, it can be useful to have a facilitator or speaker that everyone knows.
- **Ensure everyone knows who is in the meeting.** Depending on the size of the group, use creative ways to let people know who is on the call. You could share a participant list ahead of time, do a round of introductions, use polls to ask questions to the group, encourage sharing in the chat, and organize small breakouts.

Wise Practice #3: Communicate and frame to get people to your meeting

Getting people interested in your meeting or community engagement session is very important, especially if they are not obligated to attend.

Thinking about what they might need to know, what subjects might 'hook' their attention, and what concerns they may currently have can help you catch people's interest and get the right people in the room. How we frame the topic—or simply, how we talk about something—can be just as important as the topic itself. Here are some things to consider when communicating about your meeting:

- **Frame the meeting around addressing strengths, not deficits.** Focus on doing things together. Do not insinuate that people are doing something wrong.
- **Be clear and use plain language.** Have someone re-read your communications to give you a second opinion and check for errors.
- **Include all relevant details in your communication. This may include:**
 - Date, time, location, and how to join.
 - Purpose of the meeting and why their participation is important.
 - Why the meeting is happening online rather than in person.
 - What is available to support participation (transportation, tech support, honorarium, etc.).
- **Offer door prizes for participation.**
- **Invite a well-known person to co-host or present** and let people know they will be there.
- **Develop a communications plan** including who you are trying to reach, their interest in attending and how you can best reach them. Use a variety of communication channels to get the invitation out (ex. social media, printed posters, a video invitation, an advertisement in the newspaper, etc.).
- **Circulate a meeting invitation early with a calendar invite and provide regular reminders leading up to the meeting.**



Wise Practice #4: Make your meeting accessible to all

Depending on your circumstance, you may choose to host your meeting in a variety of ways, such as:

- Entirely online – this means that everyone is on an online meeting platform or calling in.
- Partially online and partially in-person (hybrid meeting) – you may choose to have a small number of people (particularly those with tech barriers) attend an in-person meeting that is connected to an online meeting with others who are joining online. [Learn more about hybrid meetings on page 15.](#)

It is also important to remember that contributing to the conversation can happen in a variety of ways. For example, perhaps someone is responsible for calling elders ahead of an important meeting to ask them three questions that they will summarize and report on in the virtual meeting. That same person can then call back the elders after the meeting to let them know what happened.

Get creative! There are many ways to contribute and make the conversation accessible to all. Here are some other ideas:

- **Provide community or family support** for those who can't join online. For example, have youth support their elders or grandparents to get online.
- **Provide technology training** either ahead of time, as part of the meeting, or through fun unrelated events (like online bingo).
- **Assess the barriers to people attending the meeting and create ways to overcome them.** Barriers come in many forms. Elders may need a family member's help to get onto a virtual meeting. A youth might need to come to your office to use the wifi. Members of your community may need translation or support to see and hear properly. You can assess these things by asking your participants ahead of time.
- **Provide technology for those who don't have it.** This might include:
 - Distributing tablets or devices with the online meeting technology pre-loaded.
 - Finding a way for people to access the internet (ex. at the band office).
- **Create a diversity of ways for people to contribute** to the conversation, such as small breakout groups, chat, emails, videos, etc.
- **Provide translation if needed.** Some online meeting platforms have an option for simultaneous translation. You may need to plan ahead if you are using this option to make sure you have the right package and that this feature is turned on.
- **Share proceedings or recordings of the meeting.** You might want to:
 - Stream the meeting live on Facebook, for example.
 - Record the meeting (audio and visual) and share it online.
- **Make it fun to get online.** You may need to warm people up to the idea of attending a meeting online. One suggestion is to host an online bingo session prior to the event so that people can get familiar with the technology.

Wise Practice #5: Prepare, prepare, prepare

Effective online meetings can take a lot of preparation, especially the first time you host one. It can be helpful to know that preparation for virtual meetings can take three times as long as the meeting itself.

The next section of this guide will share strategies and tips to help you prepare.





Section 2: Preparing for a Virtual Meeting

Like every meeting, it's important to take time to prepare for your online gathering. Preparation can include answering the 5 Ws:

- WHY are you meeting – define your purpose and goals
- WHO will be there – gather your core team and participant list
- WHAT are you meeting about – create your agenda(s)
- WHEN, WHERE and HOW are you meeting – sort out your logistics, technology and materials

Explore each of these preparation elements below then use [this preparation checklist for things to consider as you prepare.](#)

2.1 Defining Your Purpose and Goals – Why Are You Meeting?

Understanding why you need to meet can be a helpful first step in preparing for your online meeting. Perhaps you need to meet to:

- Share important information
- Gather feedback and input
- Make a key decision
- Problem-solve as a group
- Brainstorm
- Learn and share knowledge
- Connect and gather

It can be helpful to clarify what you want to achieve in the meeting from the outset. Consider writing out your meeting's purpose or goal and placing it somewhere you can see it while you prepare for your meeting. This way, you can use it to guide the rest of your planning

2.2 Gathering a Core Team and Participant List – Who Should Be There?

Your Core Team

Clearly knowing who is doing what in your online meeting can be helpful. A core team of people with different responsibilities can help ensure the virtual meeting goes well for everyone.

Possible core team roles include:

- **Facilitator:** helps run the meeting using the agenda as the guide, may run additional facilitation activities or exercises, can help guide conversations and discussions

- **Note-taker:** captures what was shared during the meeting
- **Host:** is the key “host” of the meeting, may do opening and closing prayer
- **Chat facilitator:** shares links and resources, communicates with participants, answers questions in the chat box, and brings questions or comments forward to the facilitator
- **Tech person:** understands and guides the technology components of the meeting, can share direct contact details to provide one-on-one tech support to participants if needed, will implement back up tech plans if needed, sets up breakout rooms, polls and any other tech features
- **Co-facilitators of breakout rooms:** can help guide conversations and discussions, should be in place ahead of time

Depending on the complexity and size of the meeting, you may want to consider:

- Having one or several pre-meetings with the core team to run through roles and test all the functions that you will use during the meeting.
- Having core team members come to the actual meeting 15-30 minutes ahead of time.
- Developing a detailed agenda with the core team roles named. You will find more information on agendas below.
- Figuring out who needs what technology permissions during the meeting (host, co-host, presenter, etc.).

Use this [Roles for Core Team Members worksheet](#) to help plan your core team. It outlines a number of roles you may consider for your meeting or community engagement sessions.

Participants

Whether they are supporting or participating, it’s important to think about who will attend your online meeting.

For participants, it can be helpful to prepare your list well ahead of time and gather some key details, including:

- What role do you hope they will play in the meeting based on your meeting purpose and goals?
- Can they make the meeting? Are they available and confirmed?
- What language do they prefer or require? Do they need translation, and if so, from what language to what language?
- What is their technology availability? Will they be calling into the meeting or able to join via video-conferencing technology?
- Are there other accessibility factors you need to keep in mind? How can you support?
- What cultural practices might be appropriate for your participants?

When it comes to supporting participants in virtual meetings, it can be helpful to:

- Sort the names in alphabetical order and have a printed list beside you so you can easily track who is in attendance.
- Sort people into groups ahead of time if you are using breakout rooms based on the type of breakout discussions you are having.
- Once you know who your participants are, it's time to communicate with them.

You'll want to consider who should communicate with participants, the best way to reach them, the information they need, and how to best explain the technology you are using.

When sharing technology details, you may want to:

- Keep it simple! The goal is to get participants online at the meeting, the rest of the details regarding features or other tools can wait until you are all on the call.
- Use clear instructions with simple language and images.
- Provide clear options for joining the meeting such as:
 - If you have internet access, you can join by XYZ option...
 - If you do not have internet access, you can join by XYZ option...
- Provide a phone number for a support person if they need help.
- Consider calling everyone ahead of time to check in on their technology.

Generally speaking, you'll likely want to share meeting invitations, agendas, technology details, and supporting documents well in advance of your meeting. If you can, provide all documents by email (perhaps linked to a central location like Google Documents), or snail mail ahead of time so that people have time to review and follow up if needed. Ideally, each document would correspond to an item on the agenda.

It's important to note that email communication is not always enough. It can be helpful to follow up directly with participants via phone to check in and help participants locate meeting information, open documents, download technology, etc.



2.3 Creating Your Agendas – What Are You Meeting About?

You may want to consider using two types of agendas to support your online meetings: a participant agenda and a planning agenda.

Participant Agendas

These short agendas are designed with participants in mind. Participant agendas identify items for discussion, information sharing, and decision-making. They may also outline other key items for the call including introductions, breaks and question periods, among other things.

In addition to your main agenda items, you may also want to consider:

- Making time at the beginning of your meeting for tech support (5-30 minutes depending on the audience). If you think this would be helpful, be sure to buffer this time into your agenda.
- Including technology training in your agenda. Topics may include online etiquette, how to use the mute button or video, how to rename oneself, etc. Five minutes should be enough.
- Having everyone introduce themselves. This is also a great opportunity to test the mute button and the quality of their line.
- Doing an 'ice-breaker' activity that helps people get comfortable with the technology they'll be using in the rest of the meeting. For example, you could do a quick exercise using the chat or ask a "get to know you question" that participants answer in a break out room.
- Offering breaks that are five to ten minutes long. Be sure to add these into your agenda.

Tips on Language and Translation

- You may need to allow for 2-4 weeks to get your materials translated.
- Try to use the same file names and numbers for files in English and additional languages.
- Slides should be numbered the same in English or additional language versions to ensure everyone can follow along in the same order.

Planning Agenda

In addition to the participant agenda, developing a planning agenda for the core team can help your meeting run smoothly. Your planning agenda could include:

- Your meeting objectives
- The times, details, and outcomes for each agenda item
- Who is doing what behind the scenes during each agenda item
- Links to anything that is being used or referenced in the meeting
- As much detail as is helpful to the core team

Your planning agenda will likely evolve and expand as you work through the meeting preparation and build out your meeting content. Consider setting up your planning agenda in a live document like a Google Document or working in Microsoft Word Online so all core members can access and contribute to the planning agenda.

View a [sample planning agenda here](#) and consider using this template for your planning agenda.

2.4 Sorting out Technology & Materials – When, Where and How are you Meeting?

When it comes to online meetings, there are a number of tools and technologies you can consider using.

Virtual Meeting Platforms

You'll want to decide which online meeting technology you will use to host your meeting. From Zoom to Google Meet to Webex and more, there are many options. Perhaps your community or organization is already familiar with one tool in particular. Regardless of what you use, you'll want to take some time to make sure you're familiar with the main features.

As an example, we'll explore some features and benefits of Zoom.

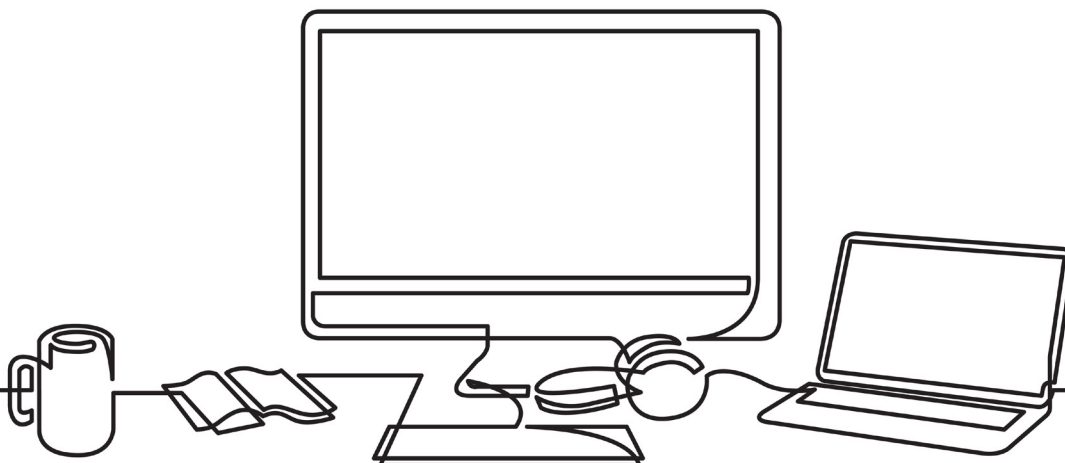
Zoom

Zoom is a secure, reliable video platform that you can use for meetings, chats, phone calls, webinars, and online events.

It has become very popular for online meetings because it is user-friendly, can be used with an internet or phone connection, includes breakout rooms, translation and other features, and can be used without downloading an app.

There are three options for people to connect to Zoom that can be shared with participants:

- Online (see and hear through your computer, tablet or mobile phone)
- See online and hear through the phone
- Hear on the phone and follow slides sent ahead (like a teleconference call)



Here are features you may want to consider using within Zoom:

Setting up a meeting

- Password – you can choose to set up, share, and require participants to enter a password for joining the meeting.
- Waiting room – you can set up a waiting room so you can manage when people join the meeting.
- Call in options, toll free and long-distance options – participants can join the call in a variety of ways.

Meeting functions

- Breakout rooms – these allow you to organize and host sub-meetings or small groups within the larger meeting. Breakout rooms are a great tool for hosting smaller discussions or brainstorming in a way that includes everyone.
- Polls – you can ask questions to your participants and have them respond using the poll feature.
- Sharing hosting – you can share “host” permissions with other participants.

General Zoom Best Practices

- Make sure the back-end settings are adjusted for what you want to do during your meeting. You can do this by logging in to your account at www.zoom.us.
- You may want to do test meetings with your core team, translators and hosts. Be sure to test:
 - Breakout rooms
 - Who can share a screen
 - Recording
 - Translation

For more information about Zoom and how to use it, [check out this link for video tutorials](#).

Collaboration Tools

Online collaboration tools are another example of virtual tools you may want to include in your meeting. These tools can provide participants with a user-friendly way to share and get involved in brainstorming and other collaborations.

Here are two examples of online collaboration tools and how you could use them.

Google Documents

What is it?

A Google Document (part of Google Suite) is an online word processing document. By opening the access and editing permissions, anyone can add to the document in real time. This creates an easy-to-use online collaboration opportunity for your group.

How could you use it?

Try setting up worksheets in Google Documents for your breakout rooms. Having virtual worksheets prepared for your meeting is a great way to help groups stay focused and work together. It can be a great tool for gathering the information, wisdom, and experience of the group. You can either share the Google Document with all participants (so everyone can enter their own information and ideas) or have one person share their screen while they take notes.

[Check out a sample Google Document worksheet here.](#)

For more information about Google Documents and how to use them, [check out this video.](#)

Google Jamboard

What is it?

Jamboard (part of Google Suite) is a tool for brainstorming and giving everyone the chance to contribute their own ideas in their own way. It is the online equivalent to giving participants a stack of post-it notes and markers, and asking them to put their ideas on the wall.

How could you use it?

Consider using a Jamboard to capture a brainstorm, visualize thinking, or gather feedback during your meeting. Here's how:

1. Ask a question to the group (for example, "What are the best ways to communicate program information with our community?").
2. Encourage participants to add colourful 'stickies' or squares to the Jamboard with their ideas.

Set up your Jamboard in advance so you can simply share the link with your group when the time comes to collaborate.

[Check out a sample Jamboard here.](#)

For more information about Google Jamboard and how to use it, [check out this video.](#)

There are a number of exciting collaboration tools out there – explore and discover!

2.5 Preparing Supporting Materials

As you get ready for your online meeting, you may want to prepare supporting documents and engagement tools, and decide how you will gather information. Here are some things to consider:

- Will you need a slide presentation to guide the meeting, including instructions and other information?
- Where will you capture the 'harvest' of your conversation? Do you need a note taker or will you use tools like Jamboard so participants create the harvest themselves?
- What documents will you provide to everyone ahead of time and how (ex. email, snailmail)?
- What information could you gather ahead of the meeting?
- Which supporting documents should be printed and sent to those with technology barriers?

2.6 Hybrid Meetings: Combining Virtual and In-Person Meetings

Depending on the situation (i.e.: COVID-19 restrictions, your budget, etc.), you may find yourself wondering how to combine online meeting spaces with in-person gatherings. It is possible to set up a hybrid meeting that brings people together in several small in-person groups that are connected through an online platform like Zoom.

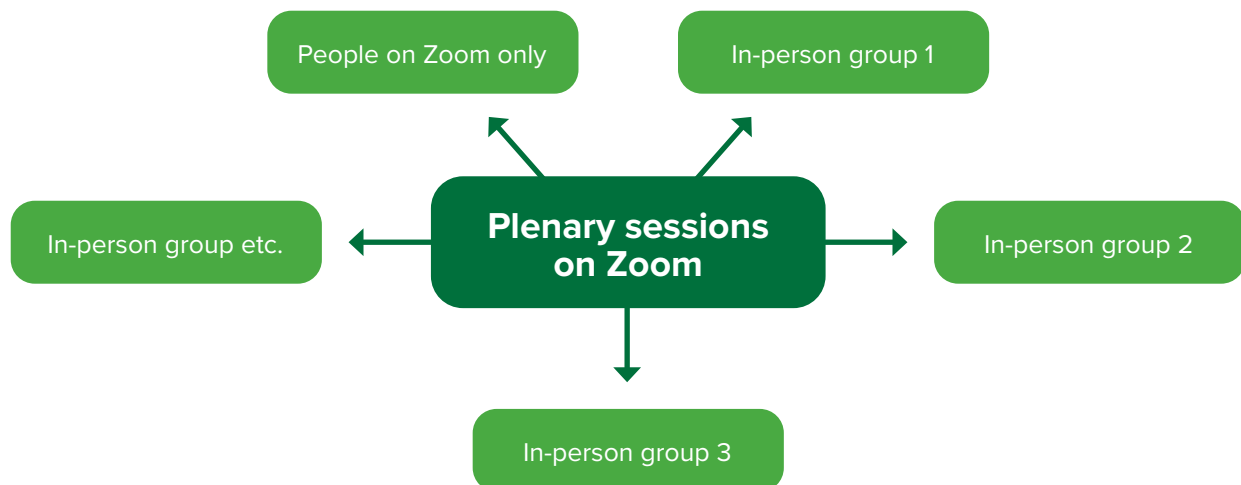
A hybrid meeting can be helpful if:

- You have a limited travel budget, making it challenging to bring everyone together in one location especially if people are joining from different communities or geographies.
- You have COVID-19 (or other) restrictions in place that prevent you from having a certain meeting size.

Best Practices for Hybrid Meetings

In a hybrid meeting setting, you may have a few small groups meet together in-person at different locations and another group joining exclusively via Zoom. These groups will all meet at the same time (but in different locations) to participate in the main meeting. Each in-person group will have one computer that will be used to connect to Zoom and the rest of the meeting participants. Ideally, each in-person group would also have a facilitator to help guide the conversation.

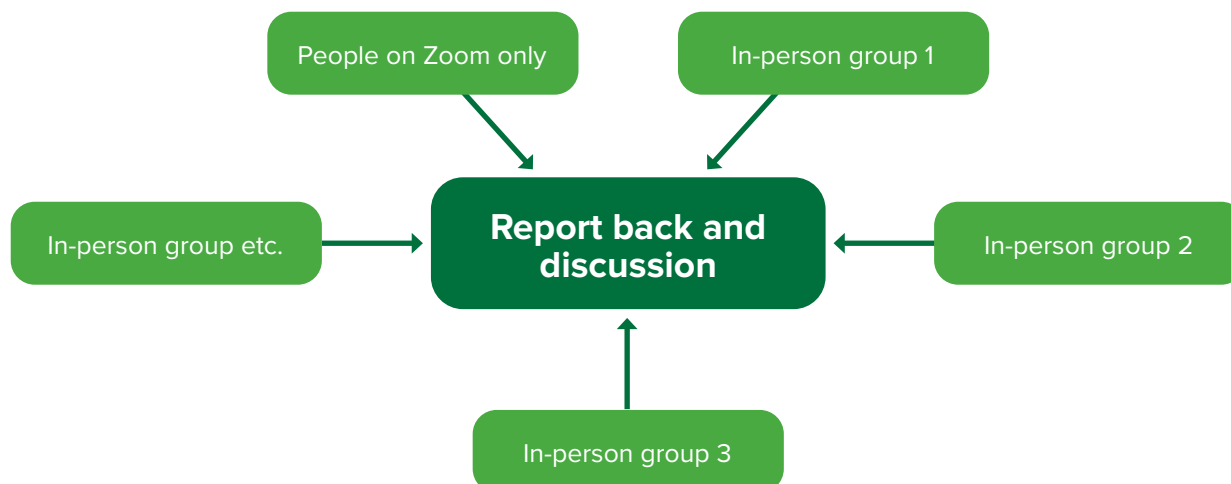
The opening prayer and presentations can take place on Zoom with each small in-person group listening through Zoom.



When it is time for discussion, in-person groups will turn off the volume on the computer, turn towards each other and have a face-to-face conversation. This is similar to doing small group discussions during a big in-person meeting, except that the small groups are in different places. If you also have people who are only joining online (and not in an in-person group) you can set up virtual breakout rooms.



Once small group discussions are done (remember to set a definitive time), the computer volume is turned back on and everyone turns to face the computer to join the rest of the participants on Zoom. You can ask for one person from each group (in-person or on Zoom) to report back on the conversation they had. They will need to stand next to the computer (or the microphone attached to the computer) so that others can hear.



Other Suggestions for Successful Hybrid Meetings

- Work with co-facilitators (people who will be facilitating the in-person groups) to ensure that you have the technology required to do this (computer, wifi that can support Zoom, mics and sound system if it is a big room, camera on computer, etc.).
- Have a tech-test meeting ahead of time (at least one day before the main meeting) where you can run through everything with the co-facilitators and the rest of the team. You will want to review the technology and the agenda during the test run.
- Develop a detailed agenda with everything the co-facilitators need to know about the conversations they are leading. You will want to stick to the times you set out in the agenda since it will be hard to be flexible with people in different places.
- Set up a way to communicate with the co-facilitators in case they need your support. This might be on messenger or a text group.





Section 3: Hosting a Virtual Meeting

There are a number of strategies and techniques to consider when it comes to hosting a virtual meeting. Below are some activities you can consider as the meeting host.

3.1 Opening Circles

Circles are a well established way for running meetings in many Indigenous Communities. Circles ensure everyone has a voice and the space they need to express themselves. This is a great option for groups of 15 people or less. For larger groups, there may not be enough time to do an opening circle.

Opening circles typically have two rules. First, you only speak when it's your turn. Second, you can pass on your turn. There should never be pressure to speak.

Why do an opening circle for every meeting?

- Opening circles let us all hear everyone's voice, help us to get to know each other, and help participants feel more comfortable speaking up during the rest of the meeting.
- Opening circles can help participants practice the mute and unmute function and check that there are no tech barriers to them speaking.
- Opening circles can establish a speaking order that you can use over and over throughout the meeting. The facilitator can decide what the speaking order is (perhaps random, alphabetical, by region, east-west, north-south, age, etc.). You may want to consider writing down each name as people speak so you can refer to it later.

Ideas for your Opening Circle

- If it is a new group, or group that works together rarely try a "Circle of Introductions":
 - Ask participants to share:
 - Their name and what they do (or what they are passionate about, etc.)
 - Their organization and/or community
 - One principle or guideline they propose to help ensure a good workshop (for example, do's and don'ts of a good meeting)
- If it is a well-established group, or group that works together often, try a "Check-in Circle":
 - Use the opening circle to connect with each other on a personal level and build the relationships that are vital to ongoing work. Checking-in allows participants to share good news, bad news, and anything in between.



3.2 Meeting Guidelines

Setting meeting guidelines for your virtual gathering can help:

- Establish a collective agreement about acceptable and non-acceptable behaviour.
- Give the facilitator legitimacy to uphold the group's agreement.
- Create a group culture that can reinforce participation and respectful dialogue.
- Set a group intention that helps to focus the group.

Once established, these guidelines or principles can be reviewed at the beginning of each meeting or revised on a semi-regular basis.

These guidelines can be especially important in cross-cultural settings, with Indigenous and non-Indigenous people, and other places where people have different meeting behaviour or habits.

Some sample meeting guidelines include:

- Encouraging everyone to take space by participating, and make space by leaving room for others to participate.
- Trying not to interrupt or speak over others.
- Keeping microphones muted when not speaking to avoid background noise.
- Turning off other devices and notifications to avoid distractions.

3.3 Icebreakers

Icebreakers are fun, light, and easy activities that can help set the tone of participation in your virtual meeting. They can also be an easy way to get participants using different features like chat in hopes that they will use it again in the meeting to share comments, questions, links, etc.

Sample icebreaker:

- Use the chat box to complete the following sentences:
 - If only I could...
 - One of the “silver linings” of this COVID-era that I’ve noticed is...
 - In my wildest dreams, I never thought that...

Find additional icebreaker examples in the [Resources and Links section](#) below.

3.4 Breakout Groups

When it comes to encouraging participation, breakout groups can be very valuable. Smaller groups often lead to better discussions as some people find it easier to share in front of less people. Breakout groups also provide people with a chance to speak and experiment with the technology. They also can help facilitate the networking or social side of meetings that is often completely missed in virtual settings.

Tips for using breakout rooms:

- Consider using the same breakout groups throughout the meeting or workshop so people get to know each other and build comfort speaking with each other.
- Prepare ahead of time to ensure you have worksheets or Jamboards at the ready, are confident using the technology, and know what you want groups to work on in their breakout group.

3.5 Participation & Engagement

Much like in-person meetings, encouraging participation can be challenging in virtual settings. While there are unique barriers in an online space, there are things you can do to encourage participation and engagement.

- Build people up to feel comfortable with the technology and with speaking-up (for example, with an ice-breaker).
- Use circles to hear from everyone on important topics.
- Use ice-breakers, energizers, breaks, etc. to help people open up and engage.
- Offer alternative forms of participation (unmute and speak, add to chat, use reactions, contribute to an online document or tool).
- Invite people to get up and stand or move as they need to during the meeting.
- Encourage people to take additional breaks beyond the set times as needed.
- Give folks the chance to participate and be part of the conversation by inviting them into discussions, activities, etc.
- Try to keep your virtual meeting 3-4 hours long, maximum. If you need more time, book a second session.

3.6 Decision Making

Decision making is often an important part of any meeting. Here are some tips to ensure you can support effective decision making in your virtual gathering.

1. Explain the decision-making process in your meeting planning. Consider the following questions:
 - a. Are you asking for a decision or a recommendation?
 - b. What constitutes a decision? Are you using consensus or majority vote?
2. Use circles during the meeting to make sure you hear from everyone.
3. When moving to a decision, generate a clear proposal and repeat the proposal at least three times. Have it up on a shared screen so everyone can see it.
4. For consensus there are three options to gather feedback and opinions:
 - a. Ask if anyone disagrees with the proposal (leave some time for people to reflect and react).

5. Do a circle to ask people to say if they 1) agree, 2) mostly agree, 3) are undecided, 4) require more information or 5) block or disagree.
6. If everyone is on video you can use visual cues like thumbs up, thumbs down to vote or test consensus.

3.7 Other Tips and Tricks

- During breaks don't log off or sign out of the meeting. Instead, turn off your camera but leave audio on so you can hear if anyone reaches out with questions or comments.
- When inviting people back after a break, ask people to turn on their camera so you know they are back.
- Expect tech hiccups and be prepared to deal with them.
- If you are going to record the meeting, seek consent ahead of time.
- Evaluate how your meeting went by asking for feedback in the chat, a discussion, or by using a poll. You're more likely to get feedback during the meeting than afterwards.

There are many common meeting and engagement challenges you may come up against in your online meeting.

Review this worksheet to explore common virtual meeting challenges and how you can address this.





Section 4: Following-Up After the Meeting

There are a few things you can do after the virtual meeting to make sure you tie up loose ends and learn from the experience.

Actions with the core team:

- Debrief with the core team immediately after the meeting (once participants leave the meeting) to reflect on how things went, what you learned, and what you would do differently next time.
- Write key points from the debrief down in your minutes so you can apply them in the future.

Other actions:

- Follow up with participants. Consider including a thank you note, information about what is next, links to resources that were shared, etc.
- Share meeting minutes.
- File everything you produced during the meeting (notes, Jamboards, worksheets, etc.) so you can refer to them later.

Congratulations! Your virtual meeting is done.





Section 5: Additional Resources and Links

Click on the titles below to open web links.

Participation and Engagement

- **[Spectrum of Public Participation](#)**
cdn.ymaws.com/www.iap2.org/resource/resmgr/pillars/Spectrum_8.5x11_Print.pdf
 - This one-page tool from the International Association of Public Participation (IAP2) may help you to think about the purpose of your community engagement, from information sharing to community-led decision making.
- **[Virtual Community Engagement Webinar](#)**
www.tamarackcommunity.ca/library/virtual-community-engagement-coaching
 - This is a webinar from Tamarack Institute about virtual community engagement. Tamarack has a lot of great resources and tools about community engagement.
- **[100 Ideas to Engage Your Community Online](#)**
go.bangthetable.com/ebook/100-ideas
 - This e-book from Bang the Table explores strategies and ideas for community engagement.
- **[Making Deliberative Dialogue Work Online](#)**
www.bangthetable.com/wp-content/uploads/2020/03/DIGITAL-Deliberative-Dialogue-Guide.pdf
 - This guide from Bang the Table explores how to make community-based deliberation work in a virtual setting.
- **[Planning for Online Engagement](#)**
www.bangthetable.com/blog/webinar-planning-online-engagement
 - This webinar from Bang the Table explores some key considerations when planning an engagement project, and unpacks a series of questions, which should be addressed before inviting stakeholders to participate.

Icebreakers

- **[Virtual Meeting Check-Ins & Icebreakers During A Pandemic](#)**
bethkanter.org/pandemic-icebreakers
 - This blog from Beth Kanter shares ideas for meeting and training icebreakers and check-ins.
- **[Icebreaker](#)**
icebreaker.range.co
 - This website contains a collection of over 200 icebreaker questions you can use to start any team meeting or gathering.

Online Meeting Tips and Best Practices

- **[Tips to Make Online Meetings Less Exhausting and Top Tips to Get Better at Online Meetings](#)**
lightful.com/blog/digital/top-tips-to-get-better-at-online-meetings-by-beth-kanter-video
 - These videos from Beth Kanter explore tips for running better online meetings.
- **[Virtual Meetings for Clarity and Momentum](#)**
38be3cd3-c27d-4fbc-a7c1-74259955c904.filesusr.com/ugd/6b38a6_85f7d647204d419b87d489293435e1d2.pdf
 - This guide from Co-Creative shares tangible guidelines and best practices for effective virtual meetings.

Online Meeting Technology & Tools

- **[Zoom Video Tutorials](#)**
support.zoom.us/hc/en-us/articles/206618765-Zoom-video-tutorials
 - This link directs you to video tutorials for using a variety of features and functions in Zoom.
- **[Google Document Tutorial](#)**
www.youtube.com/watch?v=xJiUTXGv3PE
 - This video tutorial will walk you through how to use Google Documents. Please note you will need a Google account to use this tool.
- **[Sample Google Document Worksheet](#)**
docs.google.com/document/d/1jchL2-pS1gtdQPDDn-zbQ6U1UVQYWnk10WcRiCPXDFU/edit
 - This is a sample worksheet in Google Documents. By opening editing permissions, you can share the link to your worksheet with meeting participants and have them work right in your document in real time.
- **[Google Jamboard Tutorial](#)**
www.youtube.com/watch?v=eRG8MiLPUxk
 - This video tutorial will walk you through how to use Google Jamboard. Please note you will need a Google account to use this tool.
- **[Sample Google Jamboard](#)**
jamboard.google.com/d/1_gLyZVKPRWqKADFD_DHftDOmQ2LorvRWGvZ7hgm0p9U/viewer
 - This is a sample Jamboard. You can share your Jamboard with meeting participants and have them collaborate and add ideas in real time.



Section 6: Worksheets / Infosheets

- [Checklist for Preparing for Online Meetings and Community Engagements](#)
- [Possible Roles for Core Team](#)
- [Sample Detailed Agenda](#)
- [Solutions to Common Meetings and Engagement Challenges](#)



Worksheet: Checklist for Preparing for Online Meetings & Community Engagement

Here is a list of things to consider as you prepare your virtual gathering or larger community engagement meetings. This is a list of options and considerations, not a list of essentials. Choose what makes sense for you based on the size of your meeting and the context.

Done	Item	Questions to Consider	Details
	Establish a core team to support the meeting	<ul style="list-style-type: none"> Who will oversee and contribute to getting ready and hosting the meeting? What role will they play during the meeting? Roles to consider: <ul style="list-style-type: none"> A facilitator or chair A tech support person for participants, chat and tools A note taker 	Be clear who will do what in your detailed long agenda, which should include: <ul style="list-style-type: none"> Meeting objectives Time, details for each agenda item, outcomes Who is doing what behind the scene during each agenda item Links to all pieces (documents, Jamboard, etc.)
	Create a clear purpose and agenda	Take the time to discuss and decide with your core team: <ul style="list-style-type: none"> Why are we holding the meeting? What are we hoping to have at the end of the meeting? How will we accomplish this with the time you have? Does our purpose relate to the Engagement Spectrum (sharing information, gathering information, seeking advice, collaboration, decision making)? 	Use the same structure as you would in person with the following exceptions <ul style="list-style-type: none"> Build in time for tech support before the formal meeting starts Include tech training during the introduction (online etiquette, mute button, video, renaming, etc.) Include circle introductions to help people test the mute button and the quality of their line, etc. Use an icebreaker to get people comfortable with the technology or tools used in the rest of the meeting Include short breaks
	Establish the date and time for the meeting	<ul style="list-style-type: none"> When will the meeting be? Are other important meetings or events taking place at this time? What time of day is best for the people we want to attend? 	Depending on your event or meeting, you may want to check for community events, other meetings, etc. that are taking place at the same time to avoid overlap. If there are people on your list of participants you need to have in the meeting you may want to check with them to see when they are available.

Done	Item	Questions to Consider	Details
	Choose an online meeting platform to host your meeting	<ul style="list-style-type: none"> • What online meeting platform will we use? • Do we have someone who is familiar with it to help? If not, how will we become familiar with it? • Does it have all the features we want and need for the meeting? 	It is best to use the platform that at least one person is familiar with. If you are not familiar with it, schedule some time to do tech-test runs of your meeting ahead of time. Zoom is a good place to start if you have not chosen a platform, as it is affordable, has great features and allows for people to join the same meeting online or on the phone if they have no internet.
	Create an agenda for engagement and participation	<p>People like contributing. An agenda will help people contribute in an organized way together.</p> <ul style="list-style-type: none"> • What questions do we hope the group will answer together? • How will people contribute to the conversation in different ways? • Have we balanced information sharing (presentations) with discussion? • Can we use breakout rooms for discussion? • Can we gather any information from people ahead of the meeting to start information sharing? 	<p>Use online tools to encourage people to talk to each other and collaborate. Consider:</p> <ul style="list-style-type: none"> • Breakout or small groups • Chat • Polls • Google Documents or shared screens • Jamboards
	Prepare all supporting documents, engagement tools and decide how you will harvest information	<ul style="list-style-type: none"> • Will we need a powerpoint to guide the meeting, including instructions and presentations? • Where will we capture the 'harvest' of your conversation? Do we need a note taker or will we use tools like Jamboard so participants create the harvest themselves? • What documents will we provide to everyone ahead of time and how? • What information could we gather ahead of the meeting, through chat or through the evaluation? 	<p>One of the advantages of doing meetings online is that you can capture conversations in real time that contribute to the outcomes of your meeting. For example:</p> <ul style="list-style-type: none"> • Use a Jamboard to brainstorm all the ways members contribute to the subject of the meeting. • Use a Google Document worksheet to guide small group discussions where one person captures the conversation. • Use polls to gather high level opinions, preferences, etc. • Use Google Forms to create evaluations, sign-up forms or other forms.

Done	Item	Questions to Consider	Details
	Generate a list of participants, members or attendees	<ul style="list-style-type: none"> Who do we want to engage in this conversation? Whose experience, knowledge, and wisdom will help us to think about this? Who are the influential people that should be included? Can we identify who 'must be there' versus who would be 'nice to have' there? Who will communicate with them? How will we track who confirms? Do we need more information from participants such as: language needs, availability of internet and other technology, etc.? 	<p>Google Forms provides some great, simple-to-use tools for meeting registration. By creating a Google Form you can gather names, contact information and answers to questions that can be downloaded into a Google Sheet (on an ongoing basis).</p> <p>Before the meeting, sort the participant names in alphabetical order and print it. Keep it beside you to support speaking circles, which can be done alphabetically or in any other order you choose.</p> <p>If you are using breakout groups, sort people into groups ahead of time (different purposes will have different sorting logic). Sort each breakout group by alphabetical order and print out your lists.</p>
	Adjust your meeting platform (ex: Zoom) settings	<ul style="list-style-type: none"> Where do we adjust the settings for our platform? (for Zoom you must go to: www.zoom.us and sign in) Do we have the right package or plan to do what we want to do? Are there support videos to help us figure out what we want to do? Is there someone we can practice with? 	<p>Think through every detail using the agenda and adjust the settings to fit your needs. Think about:</p> <ul style="list-style-type: none"> Will you use breakout rooms? Who can share a screen? Will you record the meeting? What security features do you need?

Done	Item	Questions to Consider	Details
	Communicate clearly with participants	<ul style="list-style-type: none"> Who will communicate with participants? Have we provided information in a way that works for our participants (ex: is email enough)? Have we provided clear options for how to connect to the meeting including call-in options? Do we need to communicate with certain people by phone ahead of time? Can we plan to provide all documents for the meeting at least one week ahead of time? What is the best way to ensure that participants with low tech skills can still participate in the meeting? 	<p>Provide all documents by email or snail mail ahead of time so that people can join by telephone if needed.</p> <p>You may need a follow-up phone call to help participants find the email, open the documents, download Zoom, etc.</p> <p>Provide clear options for connecting to the meeting:</p> <ul style="list-style-type: none"> If you have an internet connection... If you don't have an internet connection... If you need help call us at... (a phone number for someone who can support)
	Prepare your core team for the meeting	<ul style="list-style-type: none"> When can we meet one week ahead of the meeting for a tech test? Who needs what permissions during the meeting (host, co-host, presenter, etc.)? What other supporting documents and engagement tools do we need to prepare for the meeting? 	<p>Depending on the complexity and size of the meeting, consider:</p> <ul style="list-style-type: none"> Having one or several pre-meetings with the core team, small group facilitators, translators to test all the functions that you will use during the meeting. Having core team members come to the actual meeting 15-30 minutes ahead of time to review the agenda, their role and tools.
	Learn from your meeting	<ul style="list-style-type: none"> What can we learn from the meeting and our experience planning and running the meeting? What will we do again? What will we do differently next time? 	<p>Plan to have a debrief with your core team immediately after the meeting finishes. Write down what you learn and share it.</p>



Worksheet: Possible Roles of Core Team Members

Depending on the size of your online meeting, each person of the core team might assume one or more roles. A minimum of two people for an online meeting core team is recommended.

Role	Details	Name
Facilitator	<ul style="list-style-type: none"> Helps run the meeting using the agenda as the guide May run additional facilitation activities or exercises, can help guide conversations and discussions 	
Note-taker	<ul style="list-style-type: none"> Captures what was shared during the meeting 	
Host	<ul style="list-style-type: none"> Is the key “host” of the meeting May do opening and closing prayer or this may be different person 	
Chat and tool facilitator	<ul style="list-style-type: none"> Shares links and resources in the chat box Communicates with participants during meeting through chat box Brings questions or comments forward to facilitator 	
Tech person	<ul style="list-style-type: none"> Clear communicator who knows tech (but is not necessarily an expert) This person’s phone number can be shared ahead of time to give one on one support Will implement back up plans if needed Sets up breakout groups, polls, etc. 	
Co-facilitators of breakout rooms	<ul style="list-style-type: none"> May be in place ahead of time so they are comfortable with role Often take notes from discussion in google spreadsheet Supports participants to address questions and use tool 	



Worksheet: Sample Detailed Agenda

This is an example of a detailed agenda for the core team only. This agenda will evolve a lot over the course of your planning. The opening can contain the objectives for the meeting, roles and responsibilities for core team members, and other essential planning information. The agenda you share with participants will be a simplified, shorter version of this agenda. You can use this sample as a template for your detailed planning agenda.

Meeting objectives:

Roles and Responsibilities:

To do:

Time	Item	Outcome	Technology and Back-end
12:00 (10 min)	Welcome back <ul style="list-style-type: none"> • 2 min: Welcome, reminders, introduce Amanda (Corinne) • 3 min: Setting the stage comments (Corinne) • 5 min: Review agenda for today (Amanda) 	All oriented	Screen share: (Claire) give co-host rights to Corinne to share screen Zoom chat: Paste link to VIEW and/or COMPLETE bio-slides COMPLETE LINK TO GOOGLE DOCUMENT WORKSHEET Zoom logistics: Claire to set up breakout groups based on poll the day before. People not on the list will be randomly place in groups (~5 people per group) CS1 group: Corinne CS2 group: Amanda CS3 group: Claire

Time	Item	Outcome	Technology and Back-end
12:10 (15 min)	Get to know you <ul style="list-style-type: none"> • 5 min: Summary, survey results, instructions (Amanda and Corinne) • 10 min: Breakout groups: <ul style="list-style-type: none"> – People will be placed in break out groups (4-6 people) – NO FACILITATORS - just a circle - allow time for all to speak 	we could use this to identify folks in the room how are working on the same critical shift - and then	Zoom chat: (Claire) prepare breakout groups ready to launch (Claire) in chat send question for prompt “What are the opportunities or challenges in your work or our work at the ORGANIZATION related to this change?” Breakout: Claire launch groups into 10 min discussion on above question
12:25 (10 min)	Presentation: The Year Ahead <ul style="list-style-type: none"> • 5 min: Where are we going (Amanda) • 5 min: High level review of presentation (Amanda) 	High level presentation of ORGANIZATION goals and new work for the coming year	Zoom Chat (Claire) during Amanda’s high level review paste in chat: What is one ‘sticky’ idea or piece of information you’ve picked up over our June ORGANIZATION meetings this year?
12:35 (60 min)	Panel: Virtual Community Engagement Strategies <ul style="list-style-type: none"> • 5 min: Brief introduction (Amanda) <ul style="list-style-type: none"> – Setting the stage on what this panel will discuss – Introduce each panelist • 5 min: Question 1 (2min/ speaker) (Amanda) • 25 min: Question 2 (3min/ speaker) (Amanda) • 10 min: Question 3 (3 min/ speaker) (Amanda) • 15 min: Q&A with audience (Amanda) <ul style="list-style-type: none"> – Invite ORGANIZATION members to pose questions to the panelists 	Highlight a variety of perspectives on how communities can conduct effective virtual community engagement gatherings and events	Amanda (facilitator) Panelists: Screen share: leave on during Amanda’s intro and turn off once questions start Zoom chat: encourage questions here during 15 min Q&A (Claire to monitor, Amanda to moderate)

Time	Item	Outcome	Technology and Back-end
1:35 (5 min)	Break		Zoom logistics: Link to Meeting evaluation poll shared in chat here to be completed before the end of meeting (Claire) LINK TO GOOGLE DOCUMENT
1:40 (40 min)	Activity: Strategic Thinking about Better Community Engagement <ul style="list-style-type: none"> Set up activity to dive into 'how' – what can we do to better engage communities online (Amanda - 5 min) 	Worksheets in google – one per small group – will harvest ideas	Zoom logistics: set up breakout groups (Claire) REPORT BACK DOC: LINK TO GOOGLE DOCUMENT G1 : LINK TO GOOGLE DOCUMENT WORKSHEET G2: LINK TO GOOGLE DOCUMENT WORKSHEET G3: LINK TO GOOGLE DOCUMENT WORKSHEET G4: LINK TO GOOGLE DOCUMENT WORKSHEET
2:20 (20 min)	Discussion: Report back Strategic Thinking <ul style="list-style-type: none"> 3-5 minutes per group (Amanda) 		Screen share: Claire to share group worksheets REPORT BACK DOC: LINK TO GOOGLE DOCUMENT WORKSHEET
2:40 – 3:00 (15 min)	Wrap up and Next Steps <ul style="list-style-type: none"> 2 min: Group photo (Amanda and Corinne) 2 min: What will happen next (Corinne) 1 min: Quick poll (Amanda) 5 min: Closing comments (Claire) 5 min: Closing prayer 	GROUP PHOTO!!	Zoom Poll: Claire set up instant poll on same questions from one day for 'what will happen next (see comment for poll questions) Completed <ul style="list-style-type: none"> Amanda to orchestrate photo Corinne to snap the screenshots



Infosheet: Solutions to Common Meeting and Engagement Challenges

Challenges	Possible Solutions
Technology	
Difficulty muting and unmuting	<ul style="list-style-type: none"> Take time at the beginning of every meeting to remind people how to mute and unmute. Practice muting and unmuting in the opening circle of introductions or check-ins.
Bad sound or choppy lines	<ul style="list-style-type: none"> Ask people to join the meeting by phone for audio sound (they can keep their computer on for the visual).
Participants have different levels of experience with online technology	<ul style="list-style-type: none"> Have a trial-run of the meeting. Provide a phone number ahead of time for people to get tech support. Invite people to join a half hour early to help troubleshoot tech problems. Use introductions and icebreakers to practice tech skills (like mute-unmute, chat box, polls, breakout rooms etc.) so they are comfortable. Arrange beforehand to have a youth or family member to help elders set up the call. Have 4-5 people in a room in person to participate in the call, with a tech person present. This is especially helpful for elders.
Many participants are having tech problems despite everything	<ul style="list-style-type: none"> Reschedule! Some days the internet is better than others. Assess after the meeting to see what could be done better next time.
People and group dynamics	
People interrupting or not following a speakers list	<ul style="list-style-type: none"> Set up meeting guidelines ahead of time and don't be afraid to remind people. Use a virtual circle to encourage a speaking order and enforce it through facilitation. Encourage people to write down their questions or comments so they remember when it is their turn. If someone interrupts or speaks out of turn it is okay to interrupt them to remind them of the guidelines and when their turn is.
Hearing from the quiet ones	<ul style="list-style-type: none"> Ask people to speak in a circle or round table by using a speakers list established by the facilitator who will call out everyone's name one at a time. Encourage everyone by reminding them that every question and all comments count. Use break out groups of 3-4 people; small settings can make people more comfortable. Offer alternative ways to share comments or questions, such as the chat box, an email after the meeting, etc.

Challenges	Possible Solutions
<p>People dominating the conversation or talking too long</p>	<ul style="list-style-type: none"> • Establish guidelines for what 'we' (i.e.: the facilitator) will do if this happens at the beginning of the meeting and have everyone agree to them. • Ask people to use the "raise hand" button. • Don't be shy to cut people off or redirect them if they are not following guidelines - this is the job of the facilitator and everyone else in the room will be thankful.
<p>Lack of focus on the topic or inability to get through the agenda</p>	<ul style="list-style-type: none"> • Plan the meeting to avoid this problem by having a clear and realistic agenda with time allowances. • Set up the meeting to avoid this problem: <ul style="list-style-type: none"> – Get people to agree to a goal for the meeting, and then generate ground rules together that will help the group get there. – Ensure that ground rules give the facilitator permission to interrupt or do something if the group gets off topic (you can ask the group - what should I do if someone is talking for too long or off topic?). – Explain how the 'circles' will work and set an amount of time for each person to contribute (ex. two minutes for each person). – Set up a 'parking lot' for ideas that are off topic but that we don't want to forget. – Tell people you will use a timer for automatic interruption. • Be confident in your role as a facilitator: • Your job is to help the group stay focused. Remember that people appreciate this. • Pick something in what they are saying and bring them back on-topic. • When time is up for the agenda item, say "we have limited time. We need to move on and we can come back to this at the end if time allows." • Remind people of the ground rules. Say for example: "We agreed to use a speaker's circle, so Corinne if you could hold onto those ideas, we will hear from you after Amanda..."
	<ul style="list-style-type: none"> • Use techniques so that people feel heard: <ul style="list-style-type: none"> – Make comments visible to everyone, using Jamboard or taking notes on a shared screen. – Use a 'Parking Lot' in Jamboard or notes on a shared screen and say "Great - we will come back to it later" and then redirect to the agenda topic. – Put feedback in chat. • Learn from what happened: <ul style="list-style-type: none"> – Narrow the scope of the agenda and recognize that more time may be needed next time. – Debrief with others before or after the call if it is a continued thing. • If it is always the same person, have a one-on-one conversation outside the meeting. • For recorded meetings, use video editing software to cut recording down and not include the off-topic elements.

Challenges	Possible Solutions
Juggling a very active chat box	<ul style="list-style-type: none"> • Have a second person support the chat (this can be your tech support person). They can answer simple questions, prioritize questions for the speaker or facilitator, etc. • Facilitator can bring chat comments into the conversation by asking the second person to share what is happening in the chat. • Ask the presenter to check the chat after they are done and continue to answer questions there, especially if time is limited. Tell participants to put their unanswered questions into the chat too.
Information sharing	
How to distribute or share confidential documents electronically	<ul style="list-style-type: none"> • Be very clear and remind people if any documents are confidential. • Google Docs are not secure and should not be used for highly sensitive information. • If you do not want to distribute, you can show the document through a shared screen during the Zoom call. • If you must share information ahead of a meeting some options include: <ul style="list-style-type: none"> – Add a watermark that says 'confidential' or 'do not share or distribute' to your document. – Send hard copies by mail. – Share electronic copies in PDF format only so they cannot be edited.
Decision Making	
How to navigate decision making	<ul style="list-style-type: none"> • Ensure that the group is clear and agrees at the beginning of the meeting on how decisions will be made (by consensus, 50%+1 vote, etc.) and techniques for making decisions (by poll, a circle, asking for a show of thumbs, etc.). • If using consensus, options include: <ul style="list-style-type: none"> – Ask if anyone disagrees. – Do a circle and ask for people to speak clearly to a proposal. – Use features like Reactions in Zoom to get thumbs up from everyone. – 'Test consensus' using a poll. – Use other polling tools (Survey Monkey, Google Forms, etc.). These can be used so the voter is anonymous.