

Virtual Facilitation Toolkit

Accompaniment to the “Facilitating Virtual Meetings” Training



What is one thing you want to improve with your virtual facilitation?

Role of a facilitator

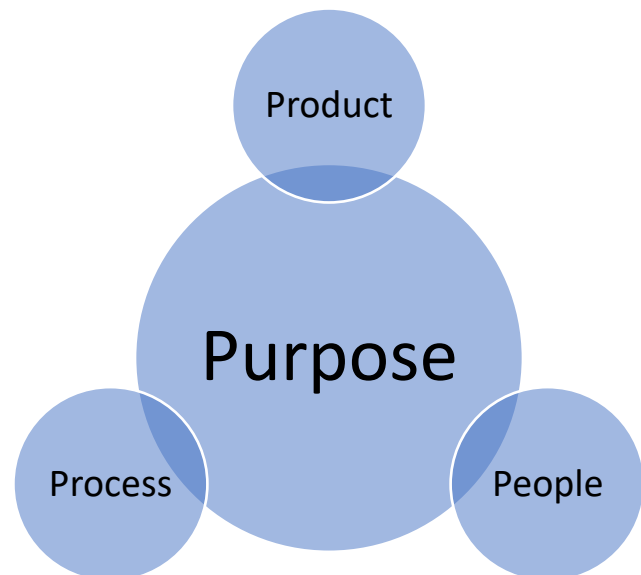
- Ensure that the meeting stays on track to meet its purpose
- Listening, “reading the room”
- Motivating participation
- Helping people to work cooperatively and do their best thinking

BEFORE THE MEETING

The 4 Ps of Facilitation Prep

Purpose: The WHY

- The broad overarching reason for meeting.
- Purpose is the north star for the meeting, everything that happens in the meeting should be in service of the meeting’s purpose.
- To help define the meeting’s purpose, ask yourself what you want to be different because this group of people meet. Think about the why behind the why behind the why until you hit the nerve that reveals what the purpose of the meeting is.



Product: The WHAT


The specific desired outcomes or objectives of a meeting. They can be tangible or experiential.

People: The WHO

- Invite people who will help fulfill the purpose of the meeting. This may include team members, people with decision making authority, SMEs, people with different ways of thinking, or any other stakeholder that needs to take part in the discussion.
- Consider what is needed to prepare them for the meeting and whether it's important to reach out to them in advance for their input on the agenda.

Process: The HOW

The activities or methods you'll use to achieve your desired outcomes. Examples include report-outs, presentations, small and large group discussion, brainstorming, consensus decision-making, etc...

	In what ways does a meeting's purpose anchor the other Ps (product, people, process)?
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Meeting Agendas

Regardless of what agenda template you use, meeting agendas ought to contain the following:

- Purpose
- Desired outcomes
- Connection Info
- Pre-work (if applicable)
- Agenda items and estimated time slots (your agenda does not always need to include times, but at least plan out the estimated times for each topic for yourself).

Pre-Meeting Checklist

- Agenda includes meeting purpose, objectives, times, topics, connection information
- Materials distributed in advance
- Technology has been tested
- Meeting expectations have been outlined (i.e. use of video)
- Meeting roles have been delegated (facilitator, note taker, tech helper, etc.)

	How might you change the way you plan virtual meetings based on we've discussed so far?
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DURING THE MEETING



Listen to Understand

- Proactive active listening where you are fully present and listening to understand what someone is saying.
- Listen for emotion by paying attention to the tone of voice and observing facial expressions and body language, which is why video can be helpful on a virtual meeting.
- Use active listening to take the pulse on what is going on with your meeting participants.



Use Your Voice

- Be more directive in a virtual meeting, then you would in a face-to-face meeting.
- Interrupt and redirect if someone is long-winded or if people seem distracted.
- Refer back to the agenda and bring the conversation back to where it needs to be, especially when the discussion goes off track.

Camera Ready Tips for Video Meetings

- Adjust the lighting or your seating position so that your face is illuminated, and everyone can see you. Avoid sitting in front of a sunny window because the backlight will make you appear like a shadow.
- Put the camera at eye level. Laptops placed on a desk or lap will give the unflattering up-the-nose view so you may need to elevate your laptop with books or a stand.
- Make sure you have a work-appropriate background. For privacy, you can use the “Blur background” feature on MS Teams.
- Practice so you confidently know how to use the mute mic and camera on/off buttons.

Starting the Meeting

Welcome Participants

- Greet participants as they join the meeting.

Introduce Yourself & Your Role

- Let people know that you will be taking the facilitator role for the meeting, and that it is your job to keep the meeting on track and on time.

Roll Call

- Have a list of invitees at the ready and do some form of roll-call so everyone knows who's "in the room." You could read the names off the list, elementary school style, or call for attendance by location. If the meeting has more than 15 people, you might forego it in lieu of having people greet everyone via that chat b

Check-in / Icebreaker

- Help people connect to one another by asking a simple question such as "What is one word to describe how you are feeling right now?" or "What is one thing you are looking forward to this weekend?" If the group is large, ask them to put their response in the chat box.

Tech Check

- Give a brief orientation to the virtual platform where you show participants how to mute themselves, where the chat box is, or how to use the raise hand function if that is available to you.

Review Agenda

- A quick review of the agenda, starting with the purpose and desired outcomes. Make sure everyone is agreement and check to see if anything is missing.

Meeting Norms

- Create or review the meeting norms (groundrules, requests/courtesies), an agreed upon list of behaviors that will help the meeting be more effective and help teammates hold each other accountable. Examples include:
 - Start and end on time
 - Use video
 - Put yourself on mute when you are not speaking
 - Minimize distractions, stay engaged and avoid multi-tasking
 - Indicate to facilitator when you'd like to speak via designated method (physical or virtual hand raise)



Facilitation Tehniques



Open-ended Questions

Ask open-ended questions to promote dialogue and elicit information. Open-ended questions usually start with a why, what or how. They cannot be answered with a simple yes or no.



Paraphrase

- Acknowledge the emotion as well as summarizing the content.
- Use the format: fact + feeling + check-in
- Use to diffuse conflict or to manage a domineering participant.



Bike Rack

Use a bike rack (also known as the parking lot) to capture ideas or questions that are off-topic or too detailed for the purpose of the discussion (ie. "in the weeds").



Round Robin

- Pause periodically throughout the meeting and do a round robin to create the space for everyone to contribute or ask questions.
- At the begining of the meeting, tell participants know you will conduct periodic round robins and let them know the order in which you will call names. Tell them it is okay to pass.
- This helps draw the quieter people into the conversation and evens the playing field for air time.



Ask Questions in the Negative

You don't want to assume that everyone is in agreement if they are silent. Asking questions in the negative creates space for people to speak up (this is especially important when you're not on video and can't see people).

- For example, instead of asking "Are we all ready to move on?" ask "Is there anyone who is NOT ready to move on?"



What techniques are you most likely to incorporate into your next virtual meeting?

Virtual Facilitation Engagement Tools

Tool	Description	Teams	WebEx	Zoom
Video	Participants use their webcams to see one another.	X	X	X
Shared Documents	Share a document with all meeting participants and they contribute to it synchronously.	X	(outside of platform)	
Screen Sharing	Participants can share their screen with everyone else allowing them to make a presentation or refer to a document.	X	X	X
Chat Window	Participants can communicate via the chat window. The facilitator can pose questions to the group to stimulate chat conversations.	X	X	X
Polling	A pop-up poll appears on the screen and allows people to vote or give feedback.		X	X
Virtual Breakout Rooms	The host can put the participants into virtual breakout rooms to answer questions or do a specific assignment, then bring everyone back to the large meeting.		X	X
White Board	The host shares a virtual whiteboard and participants can use annotation tools to write on it.		X	X
Slide Board	The host asks participants to use annotation tools directly on a slide.		X	X

How to Handle Common Technology Challenges

Sound Interruptions

- Tell people you hear the noise and remind them to mute their mics.
- Your platform may give you the ability to mute all participants, so be aware of that functionality in case you need it.

Participant Struggles

- It's always good to give a brief orientation at the onset of the meeting to mitigate this.
- Take a moment to walk them through the issue.
- Have a tech helper at the ready to assist.

Technology Fails

- Don't panic.
- Have a Plan B.
- If the connectivity is spotty for a particular participant, they can participate by voice only and turn off their video.

Closing the Meeting

- Reserve time to close the meeting thoroughly without being rushed.
- Recap and capture:
 - Decisions made
 - Action Items: Who / Does What? / By when?
- Review and address bike rack issues.
- Conduct a meeting check-out which could include:
 - Asking participants how the meeting went in one word or a number scale.
 - Facilitating a plus/delta, "Say one thing that went well in this meeting and one thing we need to change for the next meeting."
- If this is a regularly scheduled meeting, periodically, ask participants how the meeting format and platform are working for them.



Based on what you've learned, what are three actions you'll take next time you facilitate a virtual meeting?

- 1.
- 2.
- 3.

ADDITIONAL RESOURCES

- [DOI Office of Collaborative Action & Dispute Resolution SharePoint Site](#)
- [BLM Collaborative Action & Dispute Resolution](#)
- [USGS Office of Organizational Development](#)
- [USGS Collaborative Action & Dispute Resolution Office](#)
- [BLM Knowledge Resource Center Facilitation Training Webinars](#)

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