

SRO Virtual Meeting Guidelines

March 2021

CONSIDERATIONS FOR MEETING ORGANIZER

- Mode of meeting - Is it necessary to have a meeting via video or would a conference call or emails suffice? Is a video meeting the most efficient option? Consider alternatives such as: telephone conference, email or shared files with clear notes.
- Limit video calls to those that are necessary.
- Time necessary - Can the meeting be 30 minutes vs. the default of 60 minutes?
- Consider a 50-minute meeting to allow transition time for participants.
- Use timer tools that are incorporated within the platform to monitor time.
- Shared documents - Utilize shared documents in the best way possible, for example, adding comments and feedback while meeting.
- Screen share documents
 - Working on shared documents within GoogleDrive gives people an opportunity to more easily follow along.
 - Send links ahead of time so they can be accessed easily. Put links in chat.
- Start and end meetings on time to show respect for each other's time. When leading the meeting, keep track of time to know when to wrap up.
- Engagement: Make time for casual conversation
 - Before and/or after the meeting, include a few minutes of friendly interaction before diving into a meeting to help build the necessary rapport for a successful session.
- Cancel the meeting if necessary or finish early - don't meet just to meet.
- Send out an agenda ahead of time so people can better prepare.
 - If not an actual agenda, then a list of meeting topics
 - Add suggested time allotment for agenda items
 - Ask your team for suggestions
- Make sure appropriate meeting access settings are in place, particularly for recurrent meetings that are expected to take place in the absence of staff who set it up.
- If a participant joins late, do not do a full recap that others need to sit through again. Just let the participant know where you're at in the meeting and recap later.
- Does your team have the technology tools they need for virtual meetings and is it working well? Ask specific questions to find out.
- Security and confidentiality: Do not screen share PII, for example, production sample management system information or other respondent information.
- Meeting follow up
 - In order for a meeting to be effective, every person needs to leave the meeting with a clear objective. The key things everyone needs to know are:
 - Deliverables and next steps
 - Who is responsible for following up on each item or task
 - When those deliverables are due
 - When the next meeting or check-in will be
- [Consider this article on alleviating Zoom Fatigue](#)
- Things to consider when planning a meeting: [Meeting Planning Checklist](#)

CONSIDERATIONS FOR PARTICIPANTS

- Arrive promptly for meetings. Respect each other's time. If you arrive late, utilize chat when entering so as not to interrupt conversation.
- Engagement: Make time for casual conversation; Join early to talk with colleagues if possible.
- Technology
 - Test equipment setup.
 - Check your camera's position. Be sure that your camera is properly positioned for the video conference. A camera that is pointed too low on your body or pointed somewhere else in the room can be both distracting and unflattering. Make sure the camera is in a stable position and focused at your eye level. Doing so allows for more direct engagement with the other meeting participants. Also, be sure you have good lighting; natural side lighting is usually the best. Without proper lighting, you may either be ghosted out (too much light from the wrong angle), or too dark to see if there is not enough light in the room.
- To help with 'Zoom fatigue', reduce the size of the video window, create greater distance between oneself and the screen, use the Zoom settings 'hide self-view', and periodically turn the camera off altogether, if feasible.
- Stay focused so as not to distract other participants - avoid multitasking; working on a side project etc.
- Treat everyone with respect. Express opinions responsibly, focusing on the issues and not on personal differences, and speak both honestly and kindly.
- Prepare adequately for the meeting and participate fully. Read, review, or examine pertinent documents, information or input prior to the meeting. Send a message to the meeting organizer to add topics to the meeting agenda so that people can prepare.
- Do not interrupt. Recognize that we all interrupt at times by mistake or to build on others statements. However, strive to allow each person the space to finish his or her thoughts. This can be tricky to sense in a remote environment. It may be necessary to wait an extra moment before jumping in, due to video mode.
- Stay focused on the topic under discussion unless the group makes a conscious decision to alter the agenda.
- Mute your microphone for background noises, especially typing.
- Building in transition periods between video meetings can be refreshing – try stretching, having a drink, and/or doing a bit of exercise.