

What to consider when holding virtual meetings

Introduction

This has been devised to give some helpful step by step suggestions and considerations to support you with holding virtual meetings.

Your virtual meetings may include any or all of the following that would be normally be part of your day to day school practice:



Step One - Sharing Agreement

Before any meeting takes place, it may be helpful to establish a Sharing Agreement to set out the parameters of how the virtual meeting will be carried out and to ensure that everyone involved is comfortable with this.

For example, a Sharing Agreement can ensure that everyone involved is clear about how the meeting will be conducted and that they are happy with this arrangement.

A Sharing Agreement could outline the following:

- Purpose of the meeting
- Date and time of the meeting
- Length of meeting
- How the meeting will be conducted: telephone conferencing or video conferencing
- Individuals involved and their role
- Any documents that will be shared during the meeting
- Consent and agreement that participants are happy to carry out the meeting in this way

This can be sent out to everyone beforehand and provide a record that everyone is happy to go ahead with the meeting in this way. *(sample provided in Appendix A)*

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Step Two - Setting up the meeting

It is helpful to spend time preparing for the meeting to ensure that it runs as smoothly as possible.

Telephone Conferencing

You may wish to set up a telephone conference where more than two participants can speak and join in. You will need to select a platform to do this and it is important to ensure that this is secure and compliant with your school policy.

- Pick a date and time for your conference call
- Send a conference call invitation
- Dial into your conference all at the agreed time

Video Conferencing

There are a range of different ways you can use video conferencing; however, it is important to ensure that the platform you choose is secure and compliant with your school policy.

Some helpful suggestions to consider beforehand are:

- Send an agenda to everyone which outlines how the meeting will be organised
- Select one person to chair the meeting so they act as the lead participant
- Select one participant to keep track of timings and another participant to record minutes for the meeting which can then be circulated afterwards
- If you plan to share a document(s), ensure this is saved in a place that is quick & easy to access and doesn't involve going through several document folders where confidential information could be inadvertently shared
- Choose a space to sit in where the background is neutral and blank (e.g.: against a plain wall or create a plain screen) and does not hint at anything personal
- Consider switching off any other devices in a household during the meeting (e.g.: Alexa or SMART technology)
- Prior to the meeting, share an information sheet with some basic instructions on how to use video conferencing, for example:
 - How to log in
 - Who will be the lead participant and what that involves
 - What will be expected from participants during the meeting
 - How to use certain functions, e.g.: mute button, hands up button, etc
 - How the key points from the meeting will be recorded and circulated afterwards

This can help to make the meeting run smoothly. Appendix C gives an example of this.

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Step Four – Holding the meeting

Some suggestions to support you with carrying out your virtual meeting:

- Turn on the video conferencing before everyone joins the meeting. This will help participants feel part of the meeting from the minute they join it.
- Ensure any presentation slides or key documents are open and ready to be shared
- Lead participant introduces everyone in the meeting and encourages them to nod or say hello as they are introduced
- Begin by going through a 'Welcome slide' with the agenda that sets out the structure and timings for the meeting (*see appendix B for sample Welcome Slide*)
- Lead participant outlines how the meeting will run e.g.: when participants may be expected to use their mute button, or hands up buttons etc
- Lead participant confirms which documents will be shared during the meeting, who will be the time keeper and who will be recording the minutes
- At the end of the meeting, summarise the key actions that will follow and ensure everyone is happy and in agreement with this.
- Thank everyone for their time and contribution

Step Five – After the meeting

As soon as the meeting has taken place, it's helpful to email a copy of the minutes and agreed next steps so everyone has a record of this.

Follow up on any action points as you normally would.

Appendices – Helpful Examples

In the appendices, you will find some helpful examples to support you:

Appendix A	Sample Sharing Agreement
Appendix B	Ideas for your Welcome Slide
Appendix C	Sample Virtual Meeting Instructions
Appendix D	Your Virtual Meeting Checklist

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Appendix A – Sample Sharing Agreement

Purpose of meeting:	
Date and time of meeting:	
Length of meeting:	
Individuals involved in meeting and their roles:	
How meeting will be conducted:	Telephone conferencing Video conferencing
Documents that will be shared during the meeting:	
Please confirm that you are happy for the meeting to take place in this way:	

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Appendix B – Ideas for your Welcome Slide

It's helpful to create a **Welcome slide** which also includes the agenda for the meeting. Below is an example of a Welcome slide; the agenda will depend on the type of virtual meeting you are holding, therefore, bear this in mind when creating it and how long you plan to discuss each talking point.

Welcome & Agenda

Welcome and introductions	(5 mins)
How the meeting will run	(5 mins)
Feedback from School	(10 mins)
Feedback from Parent	(10 mins)
Next steps agreed	(10 mins)
Close meeting	(5 mins)

Appendix C – Sample Virtual Meeting Instructions

An example of a tips sheet for using Google Meet. You could create one for the platform you're using for video conferencing.

Tips for successful Virtual Meetings with Google Meet (Karly Moura)

Tips for successful **VIRTUAL MEETINGS** with Google Meet



1 

Send an agenda to everyone before the meeting.



2

Make one person the moderator of the meeting.



3

One person takes notes on a shareable doc.



4

Mute your mic if you're not speaking.



5

Use the chat to ask questions and share resources.



6

Moderator calls on people to unmute microphones.



7

Make a copy of the chat transcript before closing.



8

If using video, look at the camera, not the screen.

Text by Karly Moura @KarlyMoura. Infographic by Matt Miller @jmattmiller. Icons by The Noun Project.

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Appendix D – Your Virtual Meeting Checklist

Task	When	Completed
Send out invitation for virtual meeting with Sharing Agreement		
Send out details of virtual meeting login		
Create and send out agenda with timings to all participants before meeting		
Prepare Welcome Slide and any other documents or presentations that will be used in the meeting		
Hold Virtual Meeting Allocate following roles: <ul style="list-style-type: none"> - Lead participant - Time keeper - Minute taker 		
Update and distribute meetings notes to all participants as a record of meeting and agreed next steps		