Virtual Meeting Facilitation Strategies

CCRT TIP SHEET

Contents

Campus-based Coordinated Community Response Teams (CCRTs) traditionally rely on in-person meetings to connect, engage, and move the work of the team forward. Shifting to remote work settings and hosting virtual meetings can raise new challenges for even the most experienced teams. Virtual meeting spaces can also bring new opportunities, such as increased access for team members and the opportunity to do outreach to more campus and affiliate/community partners. The purpose of this tip sheet is to share considerations and resources for facilitating virtual CCRT meetings considering the impact of COVID-19 in our work.

A CCRT is built on relationships, trust, and effective communication, and a significant part of team meetings is to give team members a sense of connection with one another and connection to the work. For this reason, when facilitating virtual meetings, equal focus should be given to both *content* and *process*. *Content* refers to the topics you will cover during the meeting, and *process* refers to the facilitation strategies you will implement to include the entire team.

Cultivating Trauma-Informed Meeting Spaces

A trauma-informed approach is one that recognizes the presence of trauma symptoms and acknowledges the role that trauma has played in their lives[1]. Hosting virtual spaces with trauma informed principles require a space where participants are present and their exposure to retraumatization is reduced. The following section is based on the six principles of a trauma-informed approach identified by SAMHSA.

- Emotional & Physical Safety - work towards taking all measures and precautions to facilitate a secure meeting space. Consider things like setting passwords or controls to access the meeting, allowing for advanced notice and consent if the meeting will be recorded, and encouraging participants to prepare and set up for the meeting in a way that supports them best (including having fidget toys, water, etc.). Encourage people to join the meeting from a space that allows for privacy for their team members but themselves too. It is helpful to encourage team members to participate from a private space if possible, or at least to use earphones so that others in their telework space cannot overhear conversations. The goal of creating safe spaces is not to avoid challenging or difficult conversations, but to cultivate environments where team members feel comfortable engaging in authentic and sometimes challenging conversations.

- Cultural, historical, and gender consideration - a trauma-informed approach also recognizes historical trauma, which is the cumulative emotional and psychological wounding from massive group trauma across generations, including a person's lifespan. Examples of these include slavery, colonization, 9/11, the experience of mass victimization like hate crimes, and now COVID-19. It is important to contextualize how intersectionality is present in our communities and how these events result in diverse reactions and trauma. Consider ways to invite group members to acknowledge and discuss important aspects of their identities. For example, you can invite people to customize their profile name and add pronouns, provide time for affinity-based peer to peer group connection, and make space for groups to report back to the large group for others to listen and learn about their staff and communities. Remind staff of where they can receive mental health services if needed.

- Trustworthiness and transparency - normalize the nuances of virtual spaces, including back noises from family members or pets. Share the goals of the meeting, participants and timeframes prior to the meeting. Consider sharing the roles multiple participants may have. These small actions can help people anticipate what's to come and be better prepared.

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1   SAMHSA. (2014). SAMHSA's Concept of trauma and guidance for a trauma-informed approach. Manual Publication IDSMA14-4884. Available on-line: https://store.samhsa.gov/product/SAMHSA-s-Concept-of-Trauma-and-Guidance-for-a-Trauma-Informed-Approach/SMA14-4884

- Peer support and mutual self-help - remind people about their options to participate and the availability to connect one on one or amongst each other or have technical support. Do check in with people through the meeting about their well-being or any emerging needs and provide breaks if your meeting goes over 45-60 minutes. As for self-care, consider encouraging everyone (including the host/facilitator) to turn off notifications and limit distractions, so people can stay focused on the meeting and the process. Taking deep breaths and/or incorporating other mindfulness exercises together after discussing a difficult topic may be helpful too.

- Collaboration and mutuality - integrate strategies and tools that allow for participation to balance and share power amongst participants. Try to limit people talking over each other and multitasking so everyone can be fully present in the meeting. Setting a framework for how team members will contribute and provide feedback during the meeting can help facilitate this process.

- Empowerment, voice and choice - establish norms for engagement and participation. Sometimes individuals in virtual meeting spaces are spoken over or silenced not necessarily to malicious intent, but because of communications delays and Internet lags. Use your role as facilitator to elevate team members who may not have had an opportunity to speak and to gently challenge team members who are taking up too much space. Remind team members of the strategies you will use to ensure that all team members have an opportunity to contribute. Allow participants the choice of having their camera on or off, and allow team members to participate orally and/or via chat. Provide clear instructions for exercises and choices people have to participate, including the option not to engage.

- Sense of value - when meetings are scheduled it means people's input and participation is important. Make sure your meetings recognize the value of your participants and avoid processes that result in transactions or checklists. Language is a powerful tool, to ensure inclusiveness and foster the sense of being part of something bigger. For example instead of talking about what you're missing, talk about what the participants can do or change to filling in missing gaps. Allow for feedback outside of meetings as some individuals may not feel comfortable sharing in a large group.

Virtual Meeting Facilitation Strategies

Before a meeting...

Remember that it is not the responsibility of the CCRT Chair(s) or Project Coordinator alone to plan meetings for your CCRT. Work with your core team/executive team/steering committee to select the platform, explore the technology, set the agenda, and plan for virtual security and troubleshooting during your virtual CCRT meeting.

1. **Familiarize yourself with the existing software or video platforms** available on your campus or in your community, before introducing a new technology. Technology is simply a tool to make facilitation and engagement easier; keep this in mind when deciding which tool to use and the goals you want to accomplish in the meeting. Your community partners may not have access or familiarity with the technology platforms used on your campus. If needed, consider sending links with guidance on how to navigate the platform, setting a practice session or joining earlier to ensure access. This may take some time, but it will allow you to continue using the same technology once you return to campus.

2. **Think about your meeting structure**. Depending on the goals of your meeting, you may be able to meet with smaller groups or set up less formal meeting opportunities.

   a. Engaging in smaller working groups allows folks to connect in smaller spaces before attending large group meetings. This will also give you an opportunity to practice using the technology.

   b. Separate, informal opportunities to connect with smaller groups and/or individuals virtually helps to maintain relationships, reduce social isolation, and provide mutual support.

   c. *Limit virtual meetings to one hour in length*. If you must meet for longer, be sure to add in bio-breaks so participants can take a break from the screen.

3. Take this opportunity to **learn how to facilitate accessible meetings**. We often reflect on how to make programs or meetings more inclusive and engaging after-the-fact; this can be an opportunity to build universally designed materials, programs, and resources. The VERA Institute for Justice has a [helpful toolkit for enhancing the accessibility of virtual spaces](#).

4. **Craft your agenda**. In the same way that participants benefit from a clear agenda for in-person meetings, virtual meetings need to have a clear purpose as well. Remember, attendees want to engage, learn, and contribute in a meeting, and then have some sort of plan for action when they leave a meeting. As you craft your agenda, think about:

   a. What is the purpose of the meeting? How will you communicate that to the group?

b. What do you hope to accomplish or learn at the meeting?

c. How will you engage attendees virtually? What adaptations need to be made? See this link for [20 online energizers to use in virtual meetings](#).

d. How will you share the meeting's facilitation or bring in others' contributions?

e. What are the action items attendees will leave with?

Once you draft your agenda, make sure to share it in advance. Time expectations differ by team and task, but on average try to get the agenda out 1 week before the meeting.

5. **Prepare for power dynamics.** Power is the ability to affect outcomes for oneself, others, and the environment[2]. Power dynamics are often at play even when they are "invisible" to some or all of us. When addressing power dynamics, assume they are always present and work towards building cultures of respect and collaboration. As you prepare for your meeting, think about:

a. Who will be perceived as holding the most power at the meeting? How can you invite all participants to feel empowered to contribute?

b. Who will be perceived as having the least power at the meeting? How can you elevate or support their role?

c. When and how will you talk about power within your team?

d. How will you name power imbalances as they come up? How will you and the team-work through them?

e. How will you know when it is time to stop a vein of conversation and move onto the next agenda item and/or revisit the topic?

6. **Plan for the safety and security of online meeting spaces**, even if you are not sharing confidential information during your meeting. The National Network to End Domestic Violence (NNEDV) has a [helpful toolkit for best practices and policies for working online](#).

7. **Troubleshoot ahead of time.** Technical issues such as poor audio, loud workspaces or internet quality may impact your meeting. Communicate with participants before the meeting on things they can do to decrease the incidence of these issues, for example:

a. To enhance internet quality is best to connect the computer/laptop directly to the ethernet cable.

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2   Coleman, P. & Tjosvold, D. (2000). *Positive power: Mapping the dimensions of constructive power relations.*

b. To enhance audio participants may call in using their phones or using a headset, to limit external noise and have higher quality audio.

c. Develop a plan on how to update other team members if a person is unable to attend a meeting

During a meeting...

1. **Identify a co-facilitator.** It is helpful to have someone to monitor the chat box, assign break out rooms, act as a timekeeper, etc. This way you can focus on facilitating, other people can be engaged, and you can model shared leadership.

2. As the meeting begins, **review the technology or meeting platform**. Begin virtual meetings with a brief recap of how to use the online platform for folks who may be new to virtual meetings. If using multiple engagement tools or facilitating in-depth discussion consider having a co-facilitator.

3. **Check in with team members** before you get down to the business at hand. Consider developing [meeting rituals](#) during the opening or closing of your meeting. Rituals create consistency and help establish connection. Check ins and meeting rituals can help team members feel grounded and present in the meeting space, as well as deepen relationships between team members.

4. **Use similar facilitation strategies** as you might in in-person meetings, but with a twist. Remember to keep the process as simple as possible. This way participants spend less time trying to understand tasks or processes, and more time connecting, making decisions, and completing the meetings goals.

    a. Be sure that different team members are leading agenda items to model shared leadership.

    b. Avoid open-ended questions to the large group unless you also identify a strategy for how participants will answer.

    c. Identify a share-out process that works for your group. Some people like to "popcorn", where an attendee shares then says "passing to ___" so that share-out order varies each time. Others like to have a set order, where a facilitator types a list of attendee names into the chat and that order is followed through the meeting. Identify a process that works for you and accommodates everyone's sharing styles.

    d. You can also consider using a virtual seating chart. Assign each participant a number when they enter the space. This number will serve as the order in which participants will engage during roll call/introductions, when answering a question during the meeting, and/or during closing comments.

    e. Participants have the option to pass on any question.

5. **Openly discuss power and decision-making processes in meetings.** Remember and remind participants that power is a social construct and that we all play a role in creating an equitable space. Use your role as facilitator intentionally and thoughtfully; review the questions in the "Before the Meeting" section and communicate out your position to the group. Sometimes it is best to identify the situation, take a break, and reconvene at another point to address power dynamics and assess where we stand and how to improve the group process.

Closing a meeting...

1. At the end of the meeting, summarize the meeting and remind participants of any next steps that were discussed during the meeting.

2. At the end of the meeting (or even throughout!), remember to **express gratitude and appreciation for the participants**. One of the most important legacies of trauma is disconnection. In our efforts to be trauma informed in all of our work and build strong trusting relationships among team members, CCRT meetings should be trauma-informed and facilitate connection.

3. Regularly reserve 5-10 minutes at the end of the meeting to gather feedback from the group on the process of the meeting itself.

4. Let participants know where they will be able to access the meeting recording (if applicable), as well as the meeting minutes, and remind them of the next meeting date and any tasks that may need to be completed before the next meeting.

Additional Resources

Trauma Informed Oregon. (2020). [Hosting a Virtual Meeting Using Trauma Informed Principles](#).

Harvard Business review (2015). [How to Run a Great Virtual Meeting by Harvard Business Review](#)

MG Rush (2020). [How to Facilitate Virtual Meetings and Participants by MG RUSH](#)

You Team (2019). [Make Virtual Team Meetings More Effective: Facilitation Skills You Need](#)

Seeds for Change (2013). [Facilitating Consensus in Virtual Meetings by Seeds of Change](#)

National Network to End Domestic Violence. (2020). [Best practices and policies toolkit](#).

National Network to End Domestic Violence. (2020). [Video Conferencing & Digital Communication Platforms: Comparison Chart](#)

Vera Institute for Justice. (2020). [Enhancing the accessibility of virtual events](#).

Training for Change. (2019).[Getting Started with Online Training & Facilitation](#) and [Facilitating Hybrid Groups Online](#)

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