

Stakeholder engagement: Strategies for convening productive meetings in Zoom

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**Institute for Clinical and
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UNIVERSITY OF WISCONSIN-MADISON



**The Wisconsin Network
for Research Support**

*Innovative patient and community
engagement services for researchers*



Office of Strategic Consulting

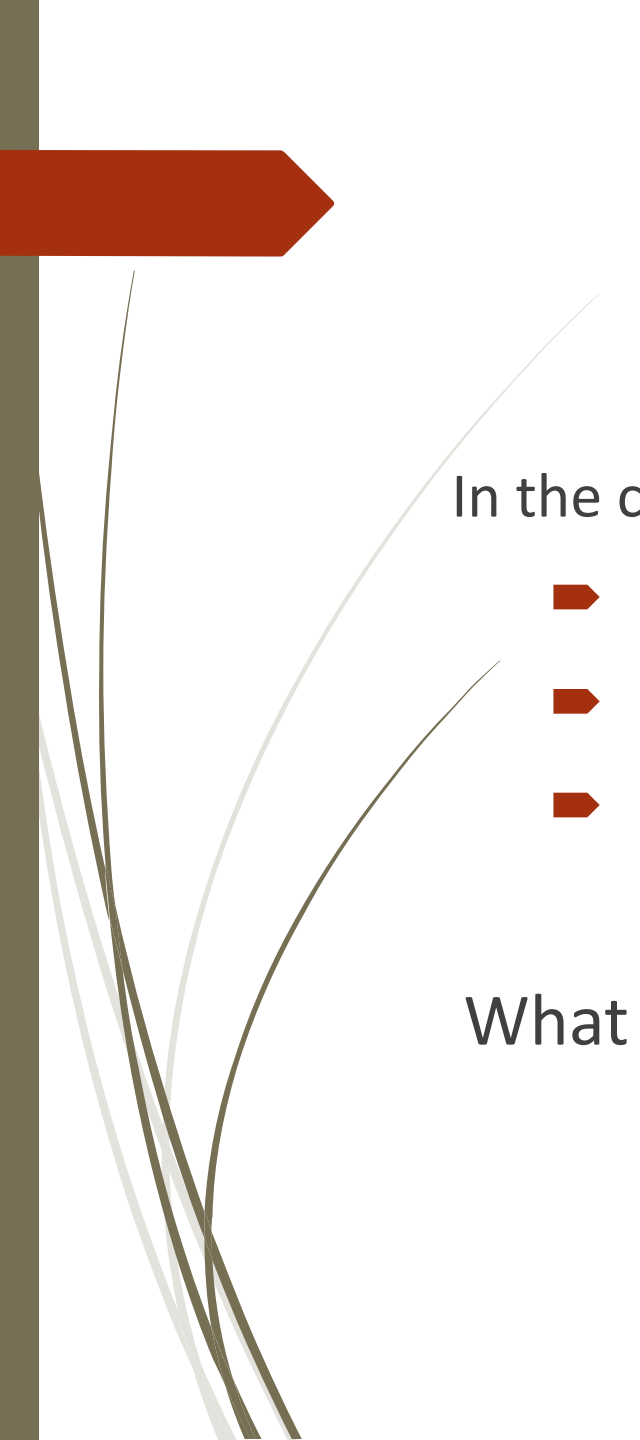
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Getting started

The Zoom Toolbar

- Gallery vs. Speaker View
- Audio (Mute)
- Video (Camera)
- Participants & Cues
- Chat Pod





Introductory activity

In the chat box, please type

- Your first and last name
- Your unit/department
- A brief answer to the question:

What can we do that reliably leads to **POOR** virtual meetings?

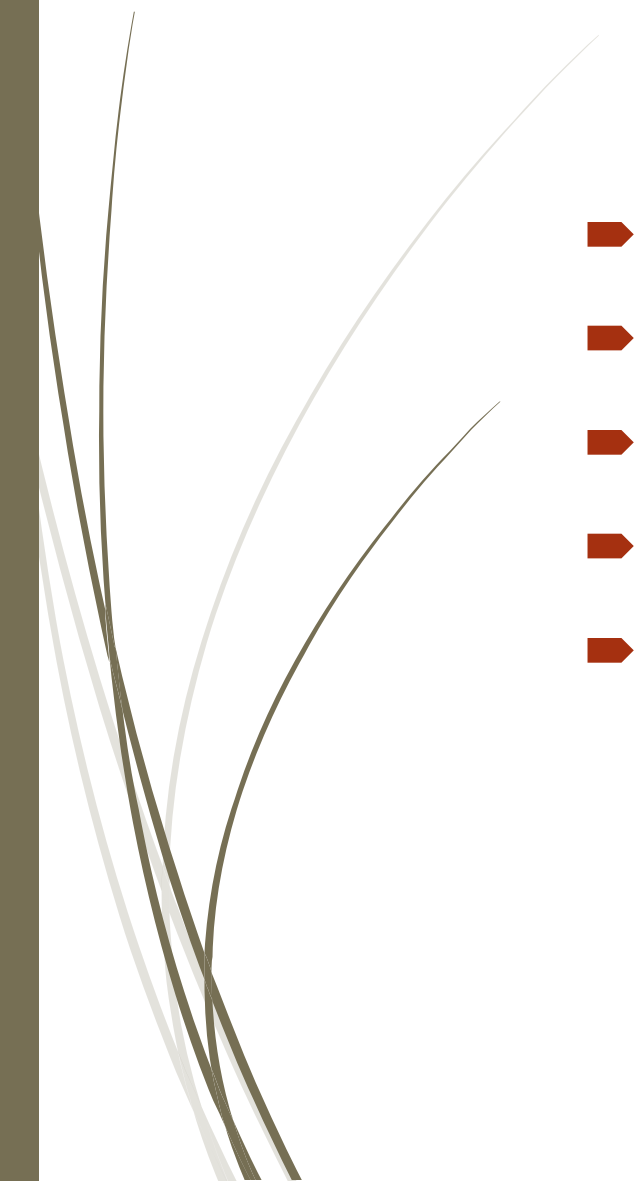
Agenda

- Introductory activity 15 min.
- Meeting planning 15 min.
- Creating an agenda 10 min.
- Features in Zoom 20 min.
- Meeting facilitation 15 min.
- Wrap-up and Q & A 15 min.

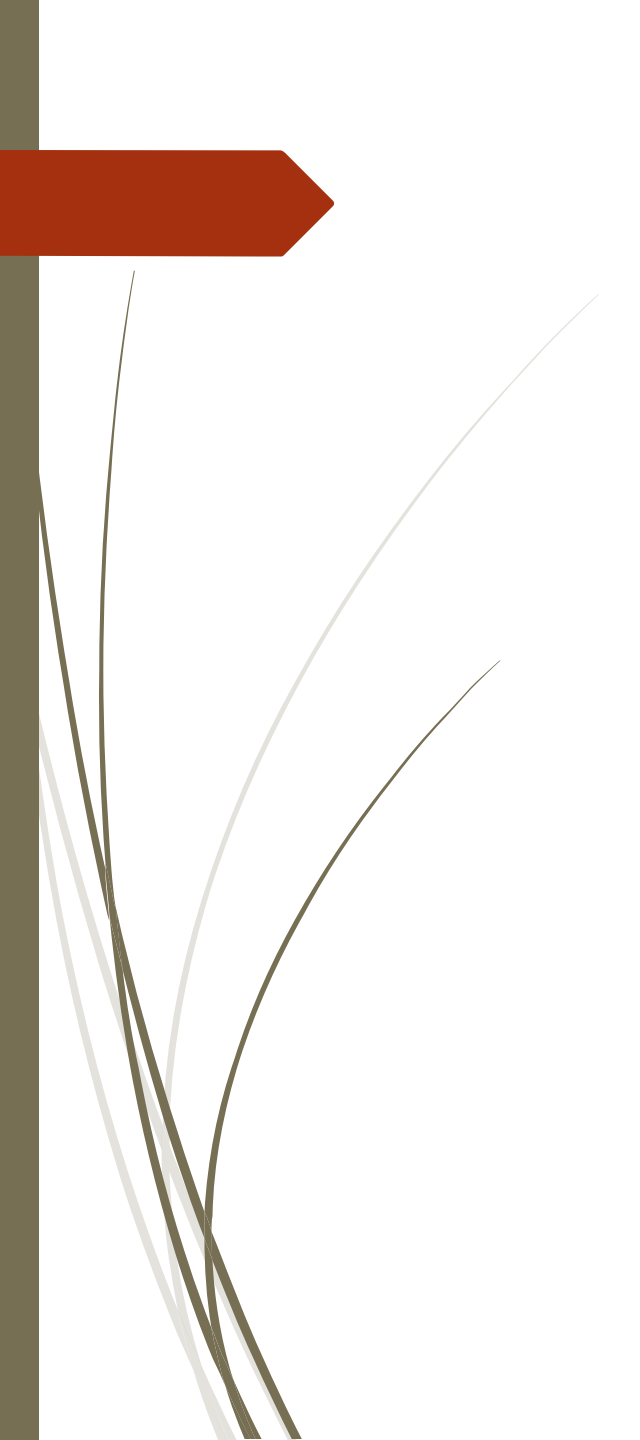




Objectives



- Describe key steps to prepare for successful virtual meetings
- Establish community operating guidelines for virtual meetings
- Explore interactive features found in Zoom
- Discuss best practices for facilitating virtual meetings
- Identify resources to expand virtual meeting skills



Who are stakeholders?

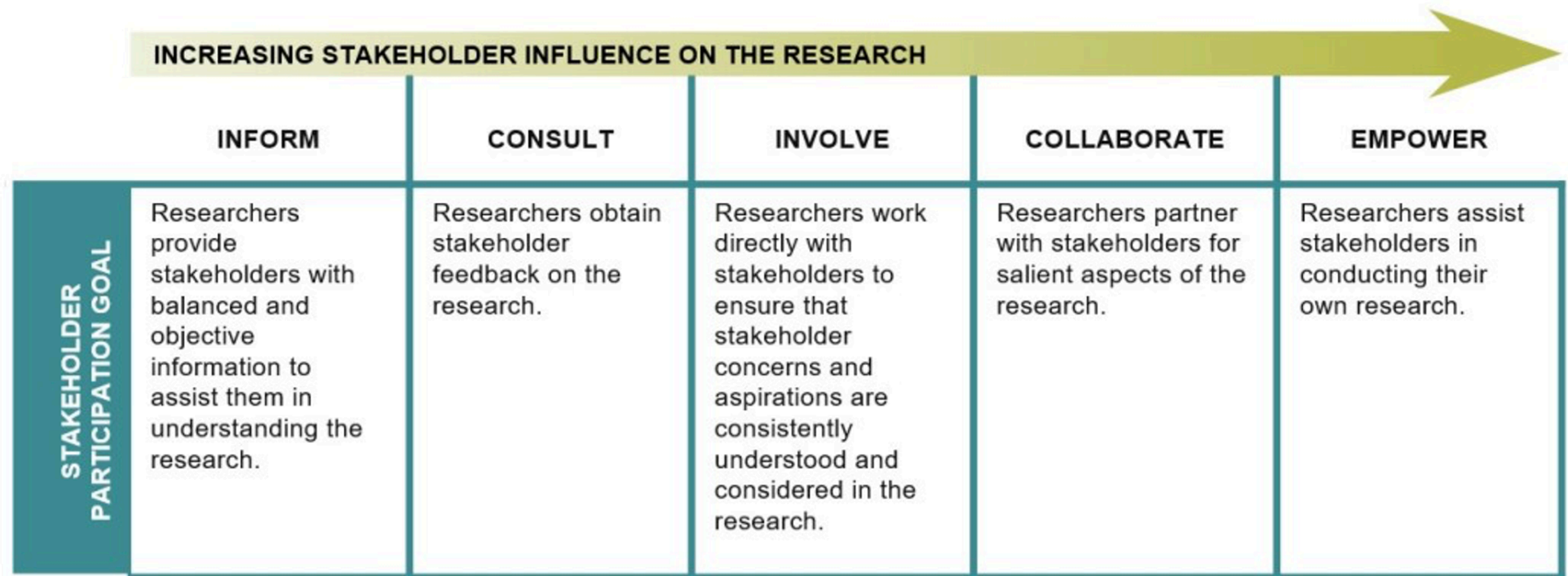
A person with an interest or concern in something

- Those directly affected by the issue
(patients, families, communities)
- Those involved in implementing change
(policy makers, service providers, funders)

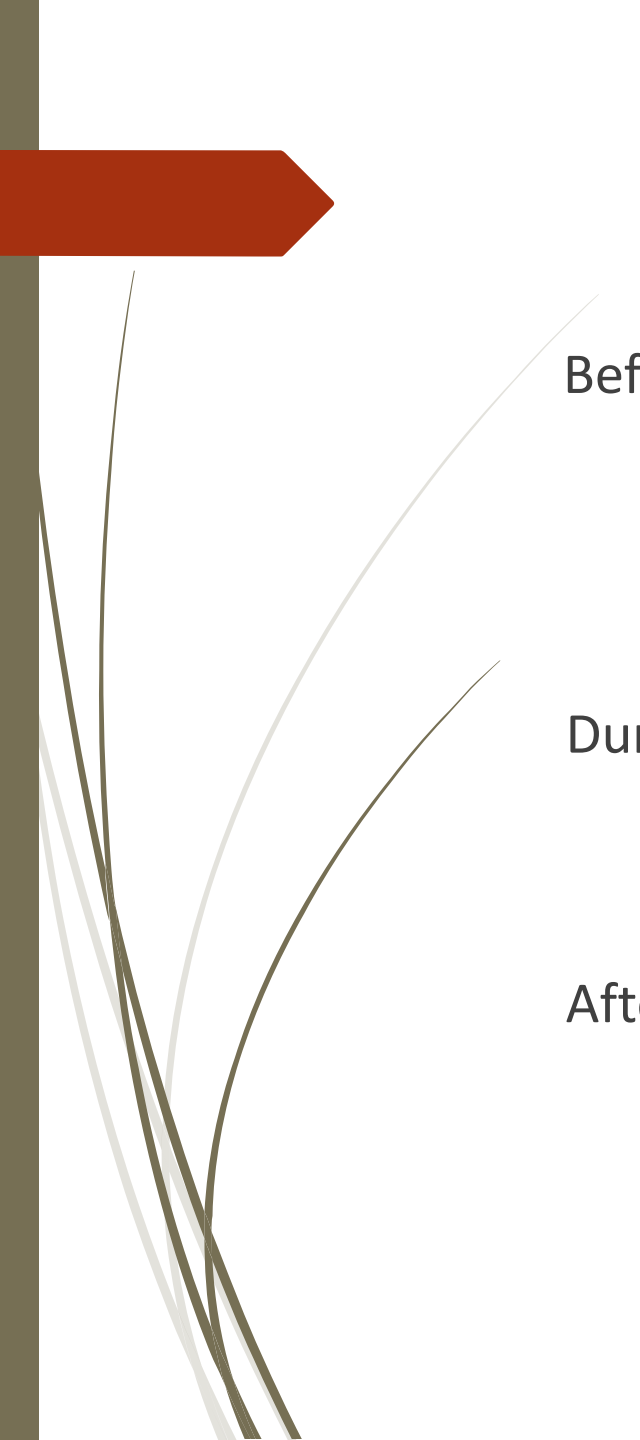
Stakeholders in health research



What input do you want from stakeholders?



Research-modified International Association for Public Participation (IAP2) spectrum. Source: Gabriele Bammer



Adapting to virtual space

Before

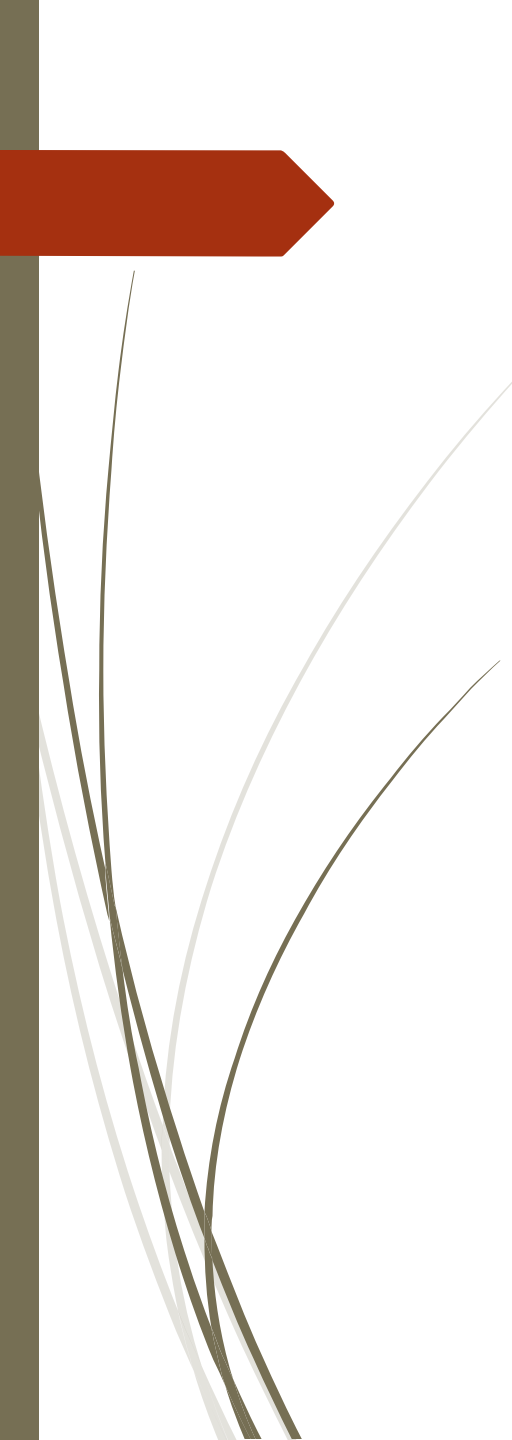
- Practice in advance (both hosts and participants)
- Identify your technical support
- Carefully match tasks with tools

During

- Set clear expectations for participation
- Allow for more “start up” and discussion time

After

- Send participants materials, presentations, outcomes
- Follow up on action items



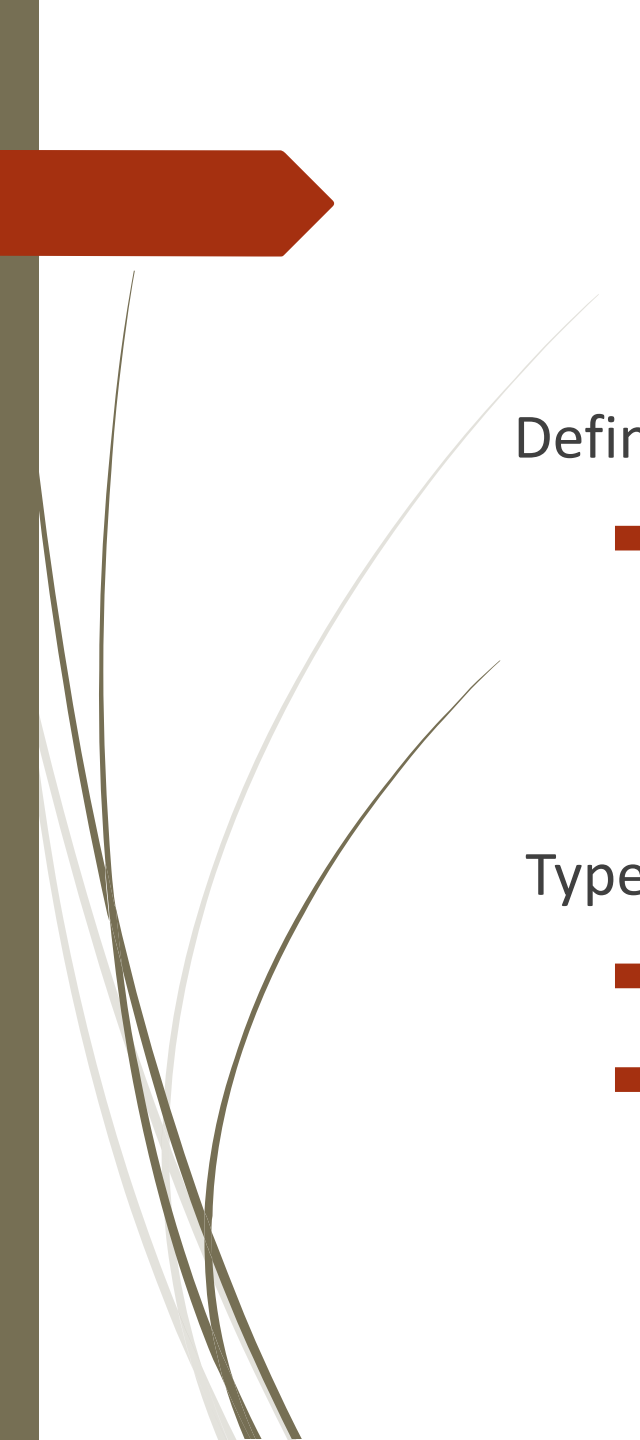
Planning for virtual meetings: Participants

Access

- Home computer, smartphone (hardware)
- Internet service, data plan (connectivity)

Familiarity

- Offer tips sheet for entering/exiting meetings and using features
- Schedule individual or small group practice sessions
- Discuss virtual meeting etiquette



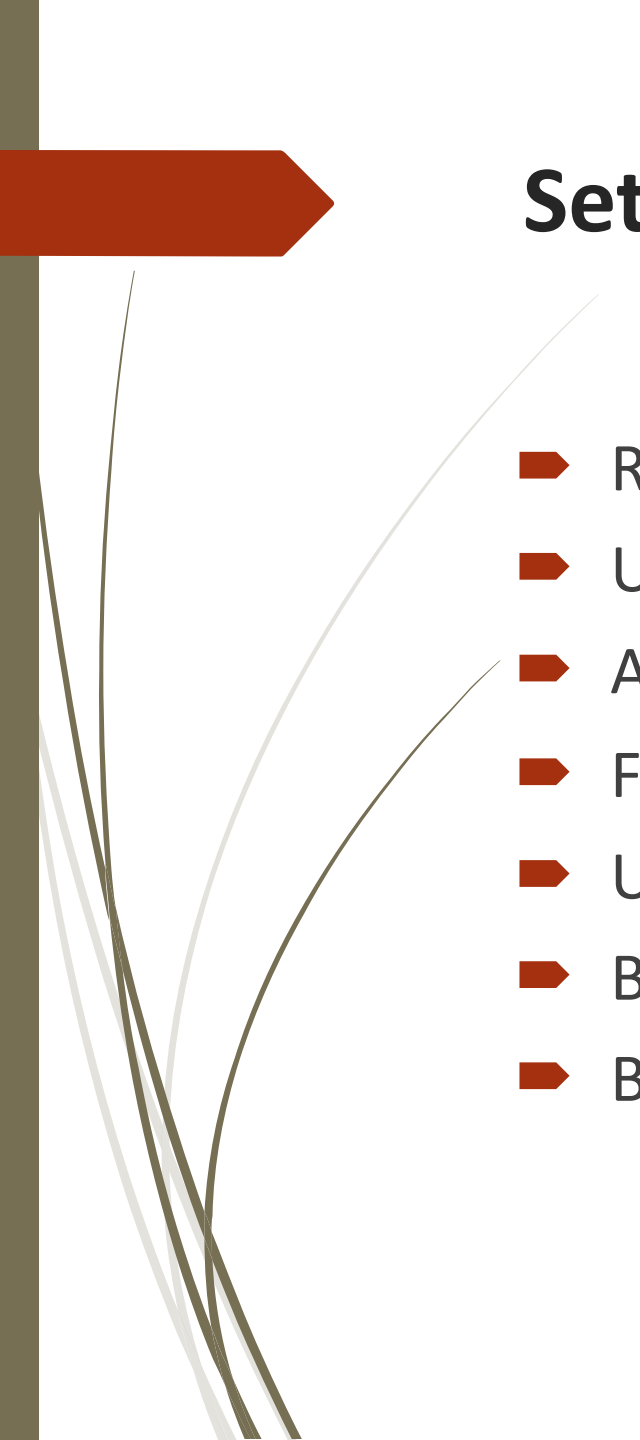
Community agreements

Definition

- A consensus on what every person in our group needs from each other and commits to each other in order to feel safe, supported, open, productive, and trusting SO THAT we can do our best work, and achieve our common vision.

Types

- Relational
- Operational



Setting expectations for virtual meetings

- Remain on camera
- Use mute function; be available to join on-mic
- Avoid distractions
- Feel free to raise your hand
- Use the phrase, “I’m done” when you’re finished speaking
- Be mindful of your airtime
- Be patient—we’re all figuring this out together

- Content courtesy of CoCreative Labs and SparkDecks



Creating an agenda

T – O – P agendas

- Determine **T**opics
- Identify **O**utcomes for each topic
 - Share information
 - Generate/analyze data
 - Make a decision
 - Continuous improvement
- Consider how to accomplish each outcome in virtual space (**P**rocess)

S. Kaner et al. (2014). *Facilitator's Guide to Participatory Decision Making*. pp. 145 – 195.

Other agenda considerations

Topics and outcomes

- What will participants do before, during and between meetings?
- What is the best sequence of topics?
- How much time will each agenda item take?

Processes

- How do you plan to start and end?
- Use multi-modal processes to support different learning styles



Common process options

- Open discussion
- Brainstorming
 - Categorize
 - Prioritize
- Managed discussion
- Presentations/reports
- Pair and Share
- Breakout groups
- Role plays/skits
- Debate
- Individual writing

For more ideas:

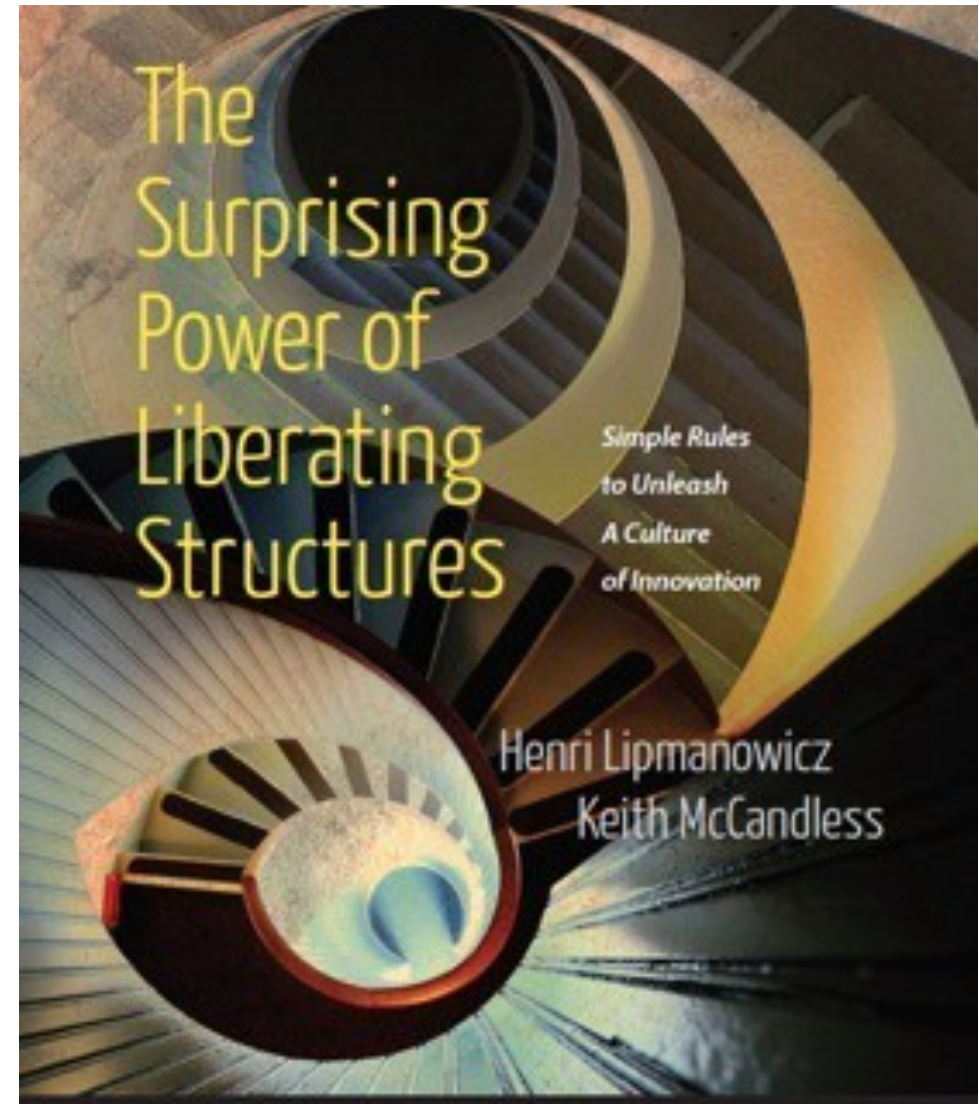
S. Kaner et al. (2014). *Facilitator's Guide to Participatory Decision-Making*. pp. 113-143.

H. Lipmanowicz & K. McCandless (2013). *The Surprising Power of Liberating Structures*.

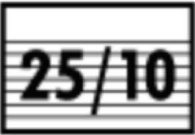
<http://www.liberatingstructures.com/>

Liberating Structures

- Alternative structures for facilitating meetings and conversations
- Designed to embrace distributed control and involve more people
- Benefits are Innovation, inclusion, participation, clarity, purpose, and fun!



LIBERATING STRUCTURES

1-2-4-All 	TRIZ 	Shift & share 	Helping heuristics 	Design storyboards 	Generative relationships 	Ecocycle 
Impromptu networking 	15% solutions 	25 : 10 crowdsourcing 	Conversation café 	Celebrity interview 	Agree/certainty matrix 	Panarchy 



Support for using Zoom

Zoom Help Center (support.zoom.us)

- Audio, video, screen sharing, recording
 - Meetings: scheduling, joining & starting, settings & controls
 - Roles in a meeting (host, co-host/alternate host, participant)
 - Advanced security settings
 - Registration for meetings
 - Managing breakout rooms
 - Meeting and webinar comparison
- 

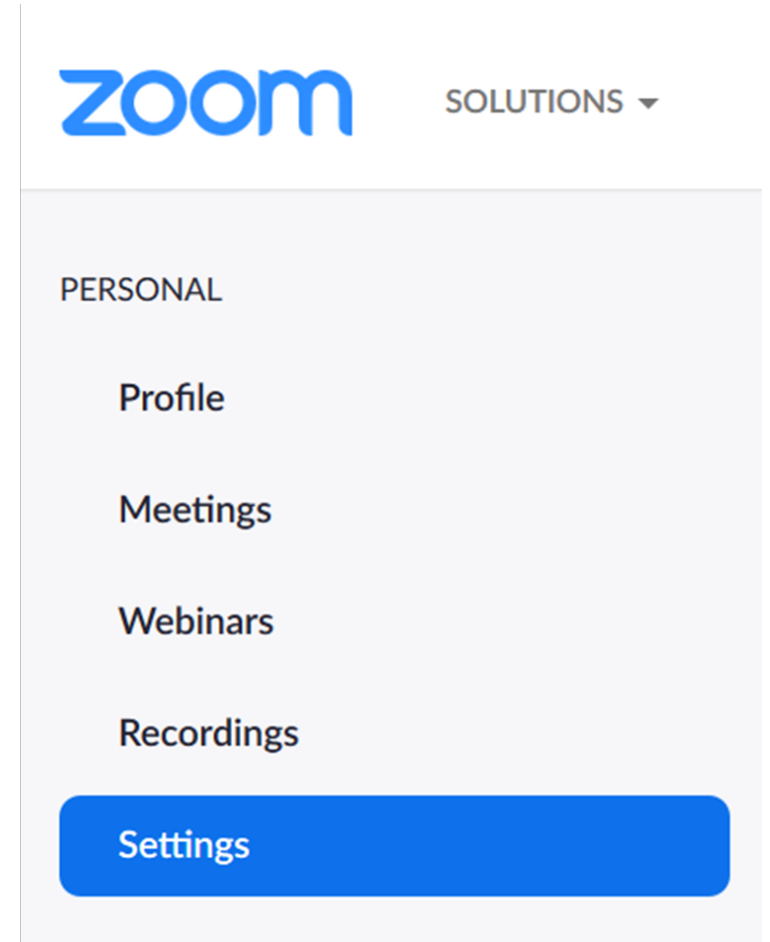
Zoom meetings vs. webinars

	Meeting	Webinar
Description	Zoom meetings are ideal for hosting more interactive sessions where you'll want to have lots of audience participation or break your session into smaller groups.	Think of webinars like a virtual lecture hall or auditorium. Webinars are ideal for large audiences or events that are open to the public. Typically, webinar attendees do not interact with one another. Your average webinar has one or a few people speaking to an audience.
Best used for	Small to large groups (2+) gathering to discuss, advise, provide input on topics or participate in training sessions	Large events and public broadcasts (50+ attendees) such as town halls or educational lectures
Used by	Any meeting convener	Event hosts
Cost	Free and <u>Paid subscription</u> options available.	<u>Paid Add-on</u> , available to Zoom Pro or higher subscriptions.

Zoom administrative (host) settings

Found by clicking “Settings” in the navigation panel on the left side of your login landing page.

- Meeting Setup & Security
- Interactivity & Engagement Tools



Zoom set-up and security

Three major security features in Zoom

- Requiring a password
- The waiting room
- Locking down a meeting

Benefits

- Gives meeting hosts more control over who enters the meeting.
- Provides increased security against the dreaded ZoomBomb.

Drawbacks

- Requires advanced setup
- Requires the host (or a co-host) to monitor and respond to waiting room messages





Zoom set-up and security: Password

Requiring a Password to Join a Meeting

- Considered a best practice
- Found under “Schedule Meeting”
- Other settings available

Schedule Meeting

Require a password when scheduling new meetings



A password will be generated when scheduling a meeting and participants require the password to join the meeting. The Personal Meeting ID (PMI) meetings are not included.

Embed password in meeting link for one-click join



Meeting password will be encrypted and included in the join meeting link to allow participants to join with just one click without having to enter the password.

Zoom set-up and security: Waiting room

Require Participants to be placed in a Waiting Room

- Provides an extra layer of security
- Allows host to screen people before entering the meeting room
- Host will receive a pop-up asking them to “Accept” or “Deny”
- Found under “In Meeting (Advanced)”

In Meeting (Advanced)

Waiting room



Attendees cannot join a meeting until a host admits them individually from the waiting room. If Waiting room is enabled, the option for attendees to join the meeting before the host arrives is automatically disabled. ⓘ

Choose which participants to place in the waiting room:

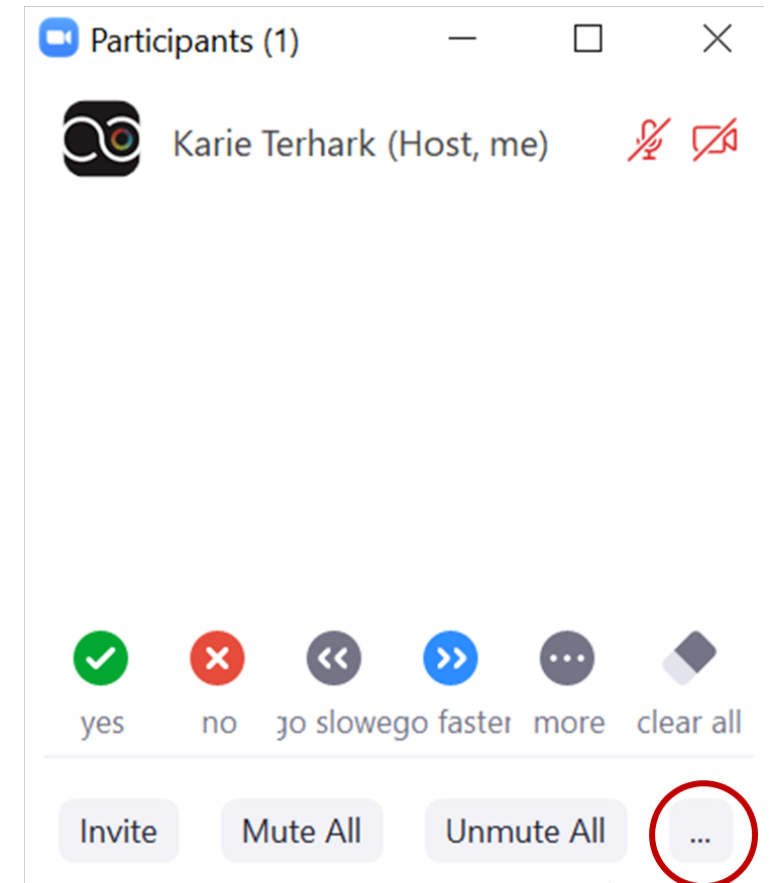
- ☒ All participants
- ☐ Guest participants only ⓘ



Zoom in-meeting security: Lock meeting

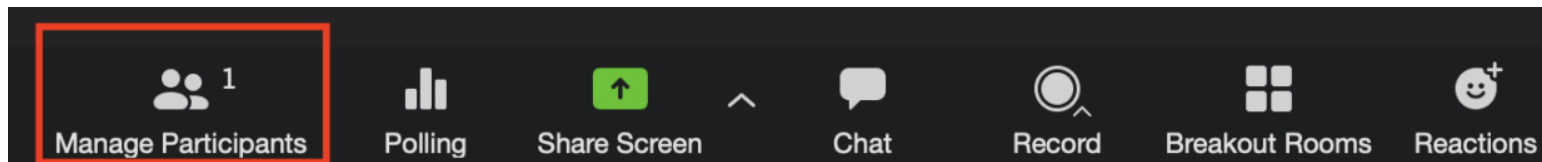
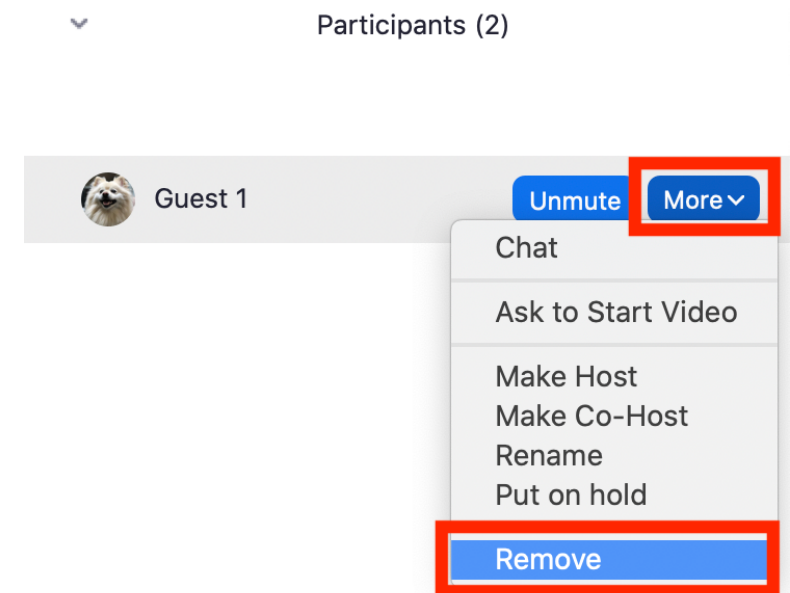
Lock a Meeting

- Provides an extra layer of security
- Allows host to lock the meeting room preventing entry
- Activate in the Participants Pod (in the meeting room)



Zoom in-meeting security: Remove participant

- Allows the host to remove a participant during a meeting
- Found in participants
 - Hover over participant to be removed
 - Click “More”
 - Click “Remove”
- To prevent re-entry, “Lock” the meeting



Zoom participatory features

Basic

- Chat box
- Participant cues (yes/no, faster/slower)
- Reactions (raise hand, clap)

Advanced

- Screen sharing
- Breakout rooms
- Polling
- Annotation



Zoom features: Participant cues

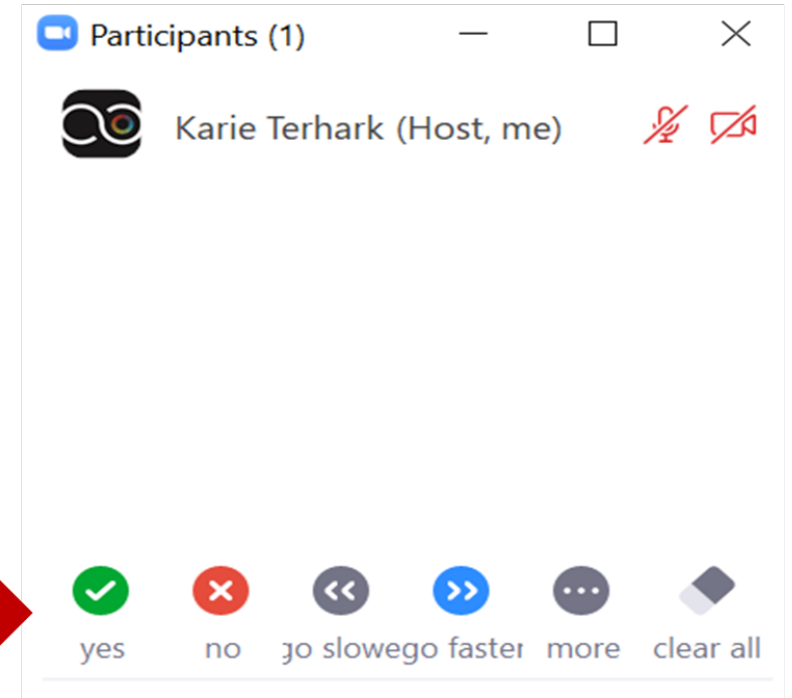
Nonverbal Participant Cues

- Participants can provide feedback
- Only visible by hosts & co-hosts
 - As a pop-up & in Pod
 - Host can reset
- Found in the Participants Pod (in the meeting room)
- Activate in “In Meeting (Basic)”

In Meeting (Basic)

Nonverbal feedback

Participants in a meeting can provide nonverbal feedback and express opinions by clicking on icons in the Participants panel. 



Zoom features: Reactions

Reactions

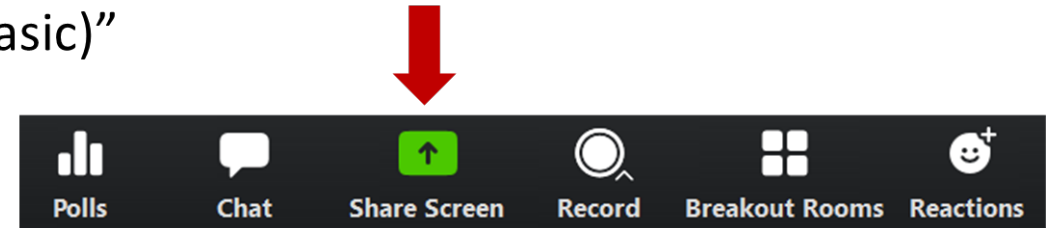
- Allows participants to express approval
 - Thumbs Up
 - Applause
- Viewable by all in each video pane



Zoom features: Screen sharing

Sharing your Screen

- Activate in “In Meeting (Basic)”
- Restrictions
 - Host only
 - All Participants
- Found in the Participants Pod (in the meeting room)



In Meeting (Basic)

Screen sharing

Allow host and participants to share their screen or content during meetings



Who can share?

☐ Host Only ☒ All Participants [?](#)

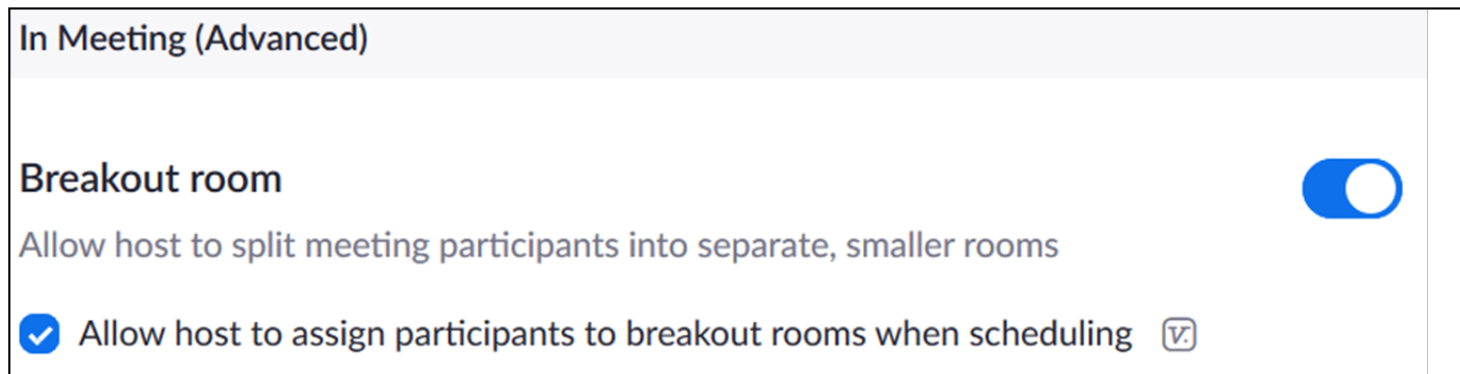
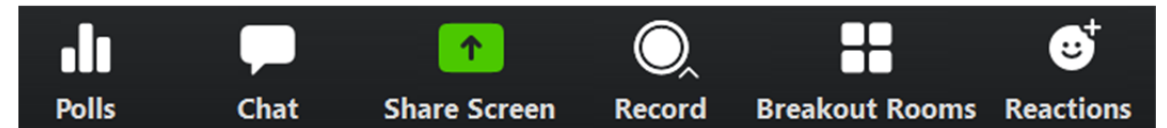
Who can start sharing when someone else is sharing?

☒ Host Only ☐ All Participants [?](#)

Zoom features: Breakout rooms

Breakout Rooms

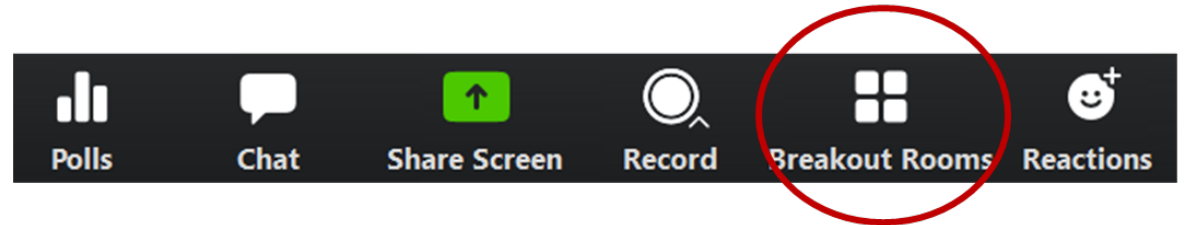
- Allows host to create smaller, private groups
- Setup in “In Meeting (Advanced)”
- Create using “Breakout Rooms” (in the Zoom pop-up bar)



Creating breakout rooms

Creating Breakout Rooms

- Click button in Zoom bar
- Select number of rooms
- Auto or Manual

A screenshot of the 'Create Breakout Rooms' dialog box. It has a title bar with a Zoom icon and a close button. The main content area shows 'Assign 0 participants into' followed by a spinner box containing the number '2', and the word 'Rooms:'. Below this are two radio buttons: 'Automatically' (unselected) and 'Manually' (selected). At the bottom, it says '0 participants per room'. A blue 'Create Rooms' button is at the bottom right.

Create Breakout Rooms

Assign 0 participants into 2 Rooms:

☐ Automatically ☒ Manually

0 participants per room

Create Rooms

A screenshot of the 'Breakout Rooms - Not Started' window. It has a title bar with a Zoom icon and a close button. The main content area shows two breakout rooms: 'Breakout Room 1' and 'Breakout Room 2', each with a blue 'Assign' button to its right. At the bottom, there are buttons for 'Recreate', 'Options', 'Add a Room', and 'Open All Rooms'.

Breakout Rooms - Not Started

Breakout Room 1 Assign

Breakout Room 2 Assign

Recreate Options Add a Room Open All Rooms

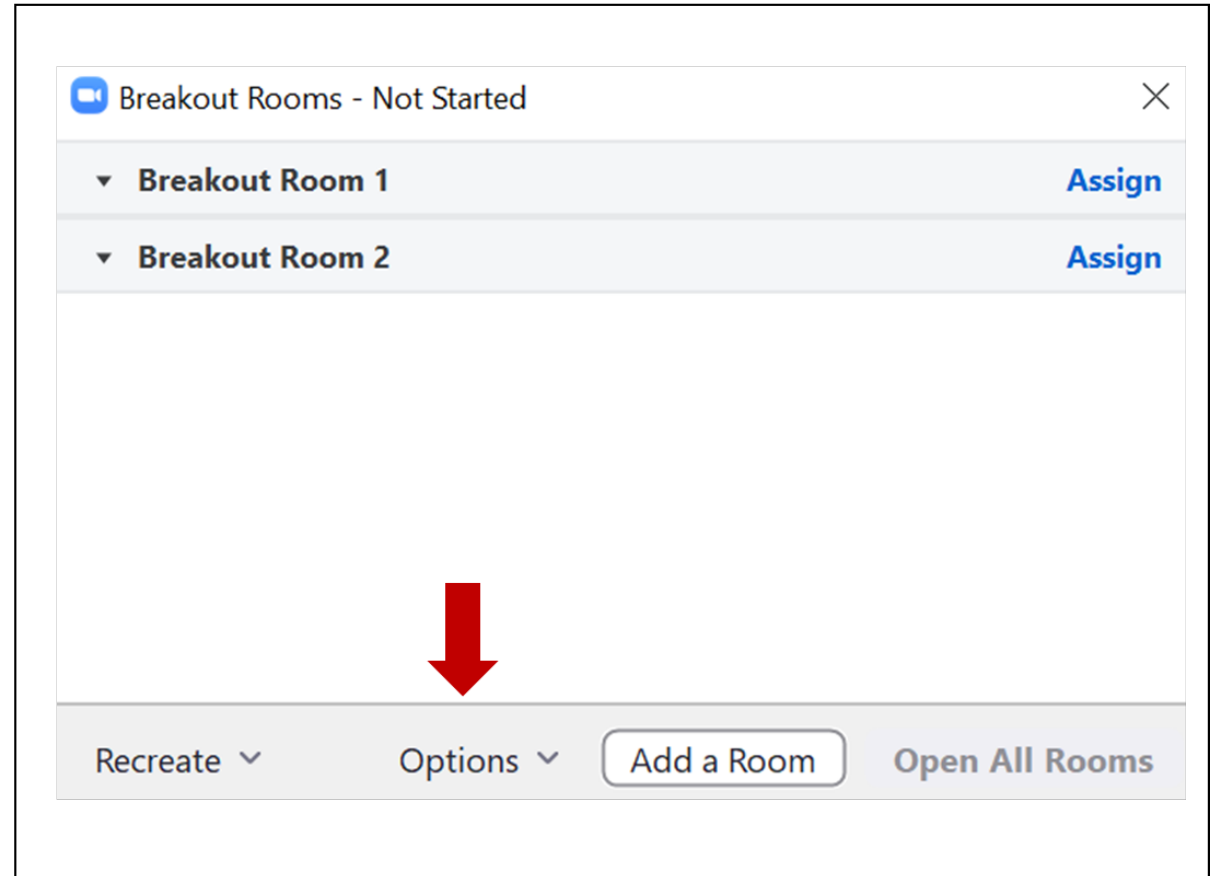
Managing breakout rooms

Breakout Rooms Options

- Auto closure
- Countdown timer

Suggestions

- Leave host in main room
- Assign a breakout room leader (co-host)
- Post directions/questions in chat
- Rename rooms



Zoom features: Polling

Activate Polling Feature

- Found in “In Meeting (Basic)”

Create a Poll

- Click on “Meetings” in the left-side navigation panel on your login landing page

zoom

PERSONAL

Profile

Meetings

Webinars

Recordings

In Meeting (Basic)

Polling

Add 'Polls' to the meeting controls. This allows the host to survey the attendees.



Creating a poll

Create a Poll (Cont'd)

- Click on meeting where you'd like a poll
- Scroll to bottom of page; Click "Add"
- Click "Add"
- Complete Form
 - Single Choice
 - Multiple Choice
- Add questions as needed
- Save

Add a Poll

Enter a title for this poll.

☐ Anonymous? ?

1.

Type your question here.

☒ Single Choice ☐ Multiple Choice

Answer 1
⋮
Answer 10 (Optional)

Delete

+ Add a Question

Save Cancel

Start Time ▾	Topic ▾	Meeting ID
Recurring	Virtual Labs 	...
		Start

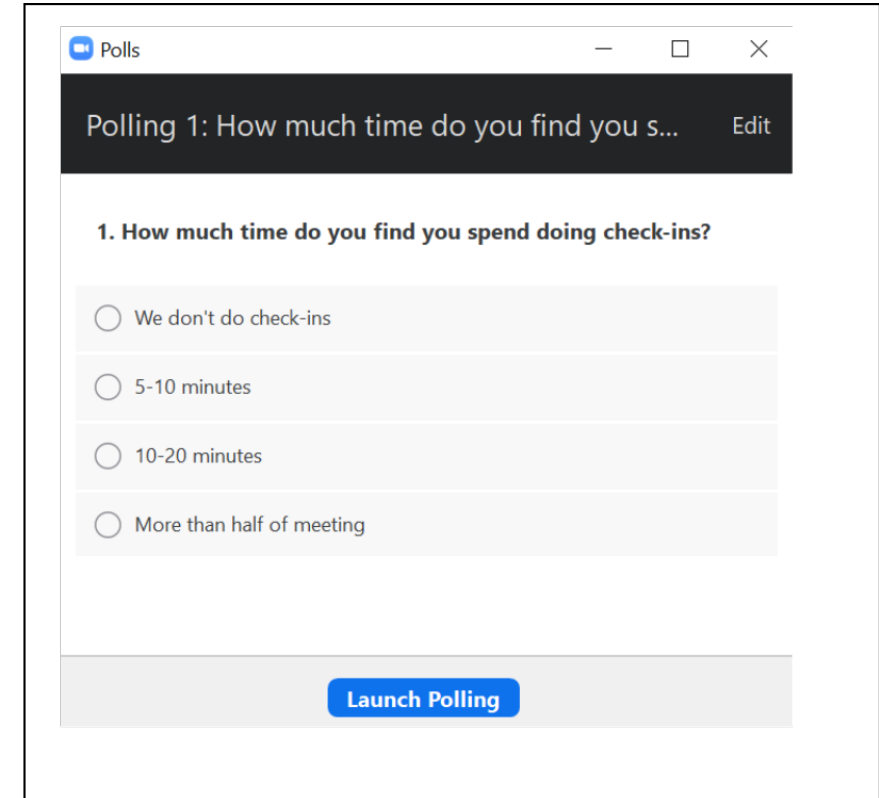
Launching a poll

Launch a Poll

- Click on “Polls” in Zoom toolbar
- Select Desired Poll
- Launch!

Sharing Results

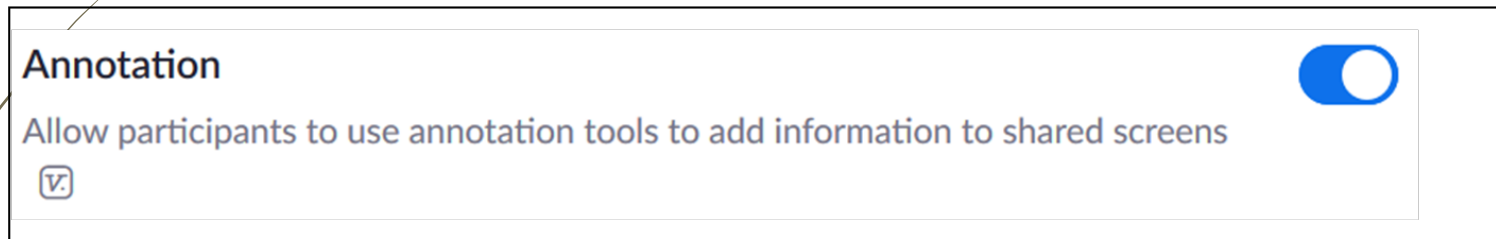
- Close/End Poll
- Send/Release Results



Zoom features: Annotation

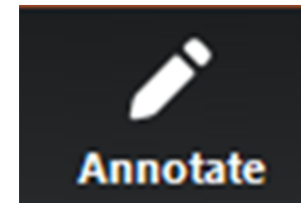
Enable Annotation

- Found in “In Meeting (Basic)”
- Allows various whiteboard capabilities on shared screens

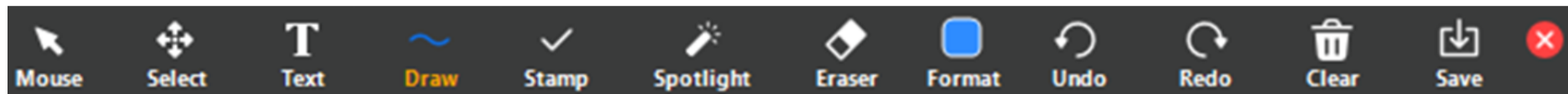


Using the Annotate Tool

- Click “Annotate” in the Zoom Toolbar
- Select appropriate tool
- Click the “Red X” to close the tool



Annotation practice



Meeting roles and responsibilities

Essential

- Leader
- Facilitator(s)
- Note taker

Helpful

- Timekeeper
- Chat monitor
- Tech support

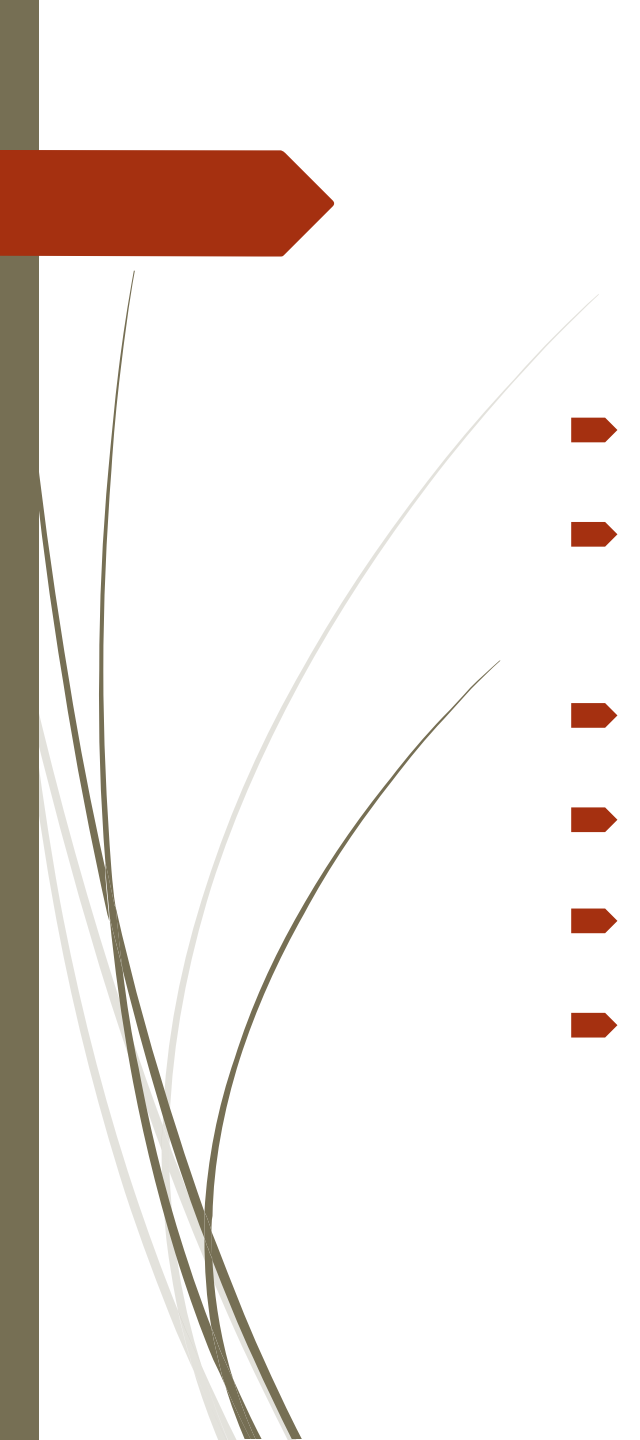




Meeting facilitation

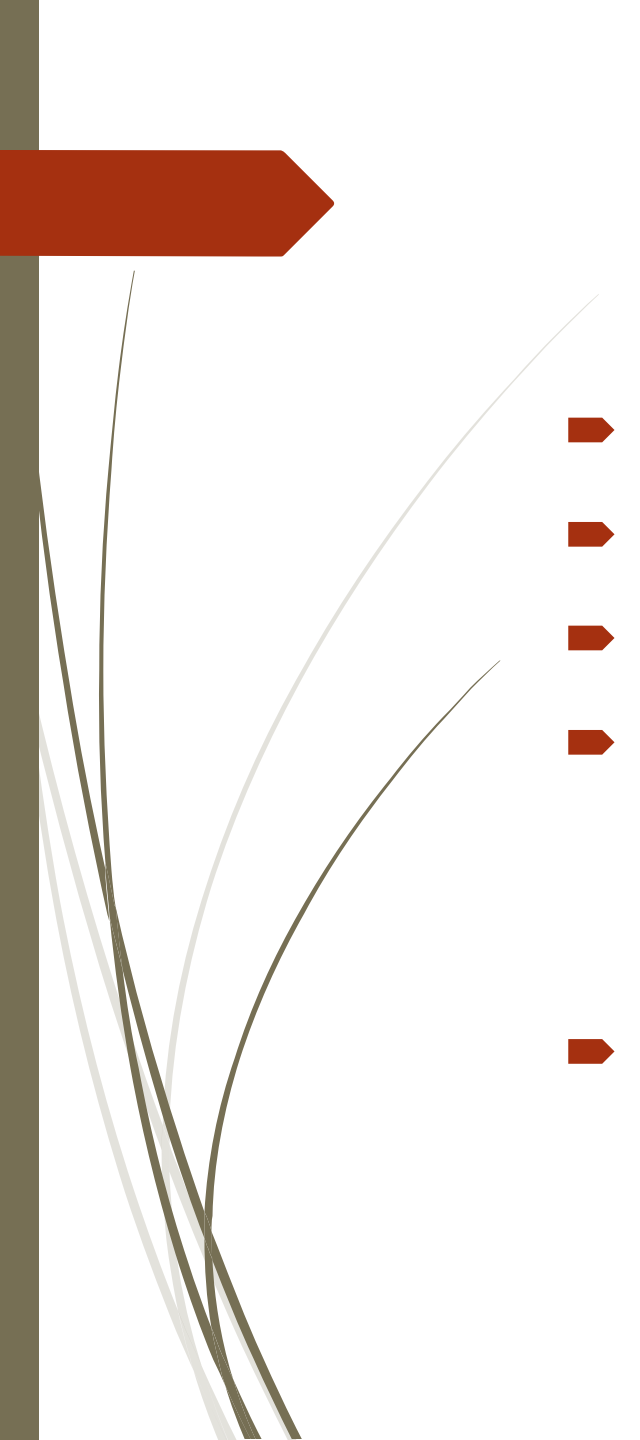
Best practices

- Be prepared, center yourself
- Start and end on time
- Use group agreements
- Hold space for open, inclusive conversations
- Engage participants
- Stick to the agenda (parking lot/community garden)
- Be agile



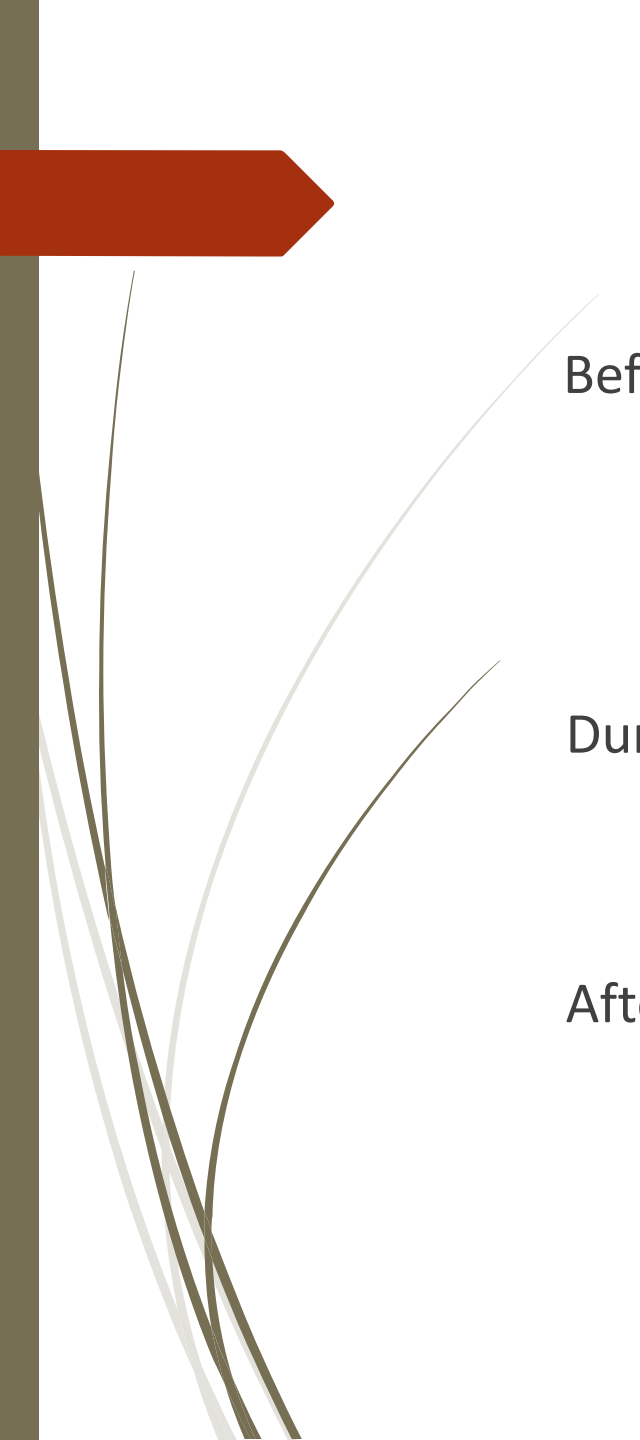
During the meeting

- Pay attention to individual participation
- Adjust your time schedule if progress is quicker or slower than expected
- Be prepared to stop and change course if need be (ELMO)
- Declare an end to each step as you move through the agenda
- Encourage participants to ask questions
- Plan regular check points



Meeting closure

- Summarize agenda items covered
- Review next steps (who will do what by when)
- Determine how to handle parking lot items
- Ask for feedback on the meeting process
 - What went well for you today – and why?
 - What didn't go so well – and why?
- Thank everyone for participating



Adapting to virtual space

Before

- Practice in advance (both hosts and participants)
- Identify your technical support
- Carefully match tasks with tools

During

- Set clear expectations for participation
- Allow for more "start up" and discussion time

After

- Send participants materials, presentations, outcomes
- Follow up on action items



Online resources for productive virtual meetings

- [Online training tools](#), Training For Change
- [Toolkit for community builders](#), Communities for Impact
- [Online meeting resources toolkit](#), resource repository
- [Leading groups online](#), e-book
- [A guide to facilitating virtual meetings](#), SessionLab
- [Best practices for effective meetings](#), UW Office of Strategic Consulting
- [Materials on effective meetings](#), UW Office of Human Resources
- [Zoom meeting basics](#), Good Group Decisions
- [Zoom Help Center](#)

Acknowledgments

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