

ACRL Best Practices of Virtual Meetings

Reviewed by the ACRL Board of Directors April 8, 2020.

Created by ACRL Working Team Members: March 2020.

Michael Courtney, Mou Chakraborty, Heather Dalal, Rebecca Graff, Samantha Harlow, Becca Neel, Jennifer Shimada, Lindsey Warton, Andrea M. Wright

Working with Your Committee or Team

Timeline

Establish early and regular communication with your committee. There may be minimum requirements established, but you should reach shared expectations with your committee on additional communication that will help you complete your work. Create your meeting schedule at the start of your term to enable group work to stay on track.

Scheduling

The first step is determining member availability. There are several tools to make the process hassle-free:

- **Doodle** is an easy and free tool to survey availability. The poll creator sets initial days/times, and then can email a link to group members. Once group members have participated, a day and time can be selected. When using Doodle, be sure to enable **time zone support** so that there is no confusion for attendees in different regions.
- **When2meet** helps you find the best time for a group to meet in a free, compact way, so that events can be created and accessed quickly.
- **WhensGood** (also free) is also used by some groups for scheduling meetings. It's up to you which tool works best for you.
- **Google Calendar** is another useful tool for organizing and scheduling meetings. It allows for individuals to create multiple calendars, with various sharing options, to manage and schedule events. Shared calendars can be useful for multiple users, and there is an app for mobile access.

In order to ensure that team members are prepared for meetings, it's a good idea to set a reminder in your own calendar a week in advance of your scheduled meetings. Send the agenda at least a few days in advance. Be sure to include links to any virtual meeting space, shared documents, or relevant items, as appropriate, in your reminder.

Communication Methods with Team

In today's world, there are many different methods for communication with your committee: in-person meetings, email, video conferences, phone calls, and collaborative editors, among others. Do what works, but make sure that you document these discussions in Connect in order to maintain openness, transparency, and a historical record. Identify in advance who is keeping minutes for the meeting.

After the Committee Meetings

Post meeting documents in the appropriate locations in accordance with your ACRL membership group's guidelines. Notify your committee members when items are posted.

Qualities for Chairs Running Virtual Meetings

Organized

- Communicate regularly: Provide regular check-ins to update everyone on recent activity.
- If meetings are required, solicit agenda items from committee members, and reach a consensus on a date and time.
- [Doodle](#) is a free tool for scheduling meetings with multiple people across multiple time zones, as is [WhenIsGood](#), [When2Meet](#), and even [Google Calendar](#).
- Use technologies that are reliable and easily accessible for members, such as Zoom meetings, conference calls, Skype, or Google Hangouts.
- During the meeting, stick to the agenda but encourage participation and discussion (use tools provided by the software, such as raising hands for polling), and know when to table an issue for future discussion.
- Delegate work to members. Remember, they have volunteered because they want to participate in the group's work. We don't expect you to do all of the work yourself.
- Give clear deadlines.

Prepared

- Understand the expected time commitment, especially if you are starting a new position or other significant changes in your work or personal life. This will vary by committee, but assume that it will be significant.
- Contact the previous chair and ask for documents relating to procedures and the committee's work, if it's not all in Connect. Ask what worked and what didn't, and why.

- Read any ACRL bylaws or manuals and the [ACRL Guide to Policies and Procedures](#). Note that all documentation may not be current.
- Identify and introduce yourself to any liaisons.

Flexible

- Utilize [lazy consensus](#): move forward even if you don't have 100% response.
- Have a Plan B for whatever the situation might be, and especially for meetings and projects.
- While it is important to set clear deadlines, understand when it is appropriate to give extensions. Remember, we are all volunteers and have day jobs and lives.
- Understand that technology fails. For example, if you're in the middle of an online meeting and there are connectivity or other technical difficulties, try to solve them and stick to the agenda.
- Acknowledge when meeting at the appointed time won't work and reschedule for a different time.

Adapted from [Important Qualities for Chairs](#) from LITA's [Virtual Engagement Toolkit](#).

Accessibility

Keep the experience of people with disabilities in mind when creating documents and choosing tools. These disabilities may include vision issues, hearing issues, mobility and dexterity issues, or cognitive issues.

Asynchronous Materials

- Provide alternative (ALT) text for images.
- Ensure hyperlinks are easy to identify (e.g, they are underlined) and that they make sense when read out of context.
- Do not rely on color alone to convey meaning, and ensure there is high contrast between colors.
- Provide a text transcript for all audio media.
- Provide synchronized text captions for videos.

Web Conferences and Webcasts

- Allow participants to ask questions or participate via chat or voice.
- Ensure the platform is accessible by providing a telephone-based conferencing connection.
- If documents or slides are going to be used in the presentation, send them out to participants in advance or within the chat.
- Assume participants may not be able to see the screen due to calling in or having visual impairments.
 - Describe aloud all visual media that is essential to understanding the content (e.g., "On this slide there's a graph that depicts...").
 - Have people identify themselves before they speak.

- Read written questions out loud before responding to them.
- Where possible, provide live captioning.
- Provide accessible versions of webcast recordings, including captioning and transcription.

Accessibility Tools and Websites

When choosing tools, research both what the vendor claims about the accessibility of their tool as well as reviews from users with disabilities. Some vendors will provide online Voluntary Product Accessibility Templates (VPATs) to show their compliance with accessibility guidelines or may provide information about compliance with Web Content Accessibility Guidelines 2.0 (WCAG 2.0).

Adapted from and for more detailed information, see [LITA's Accessibility Documentation](#).

Synchronous Versus Asynchronous Communication

There are many choices for communication for your committee.

Synchronous Options

- In-person meetings
- Video conferencing
- Phone calls

These work best for committee team building and when you need to generate and choose an idea quickly in order to move forward in your committee's work.

Asynchronous Tools

Asynchronous tools give your committee members time to provide a thoughtful response.

Email is best for:

- Scheduling meetings
- Sharing progress
- Sending reminders

However, if email chains get confusing, call a meeting.

Google Docs is an excellent way to:

- Edit collaboratively
- Involve all members in committee work

Picking Web Conferencing Software

Committee chairs can decide which web conferencing software works best for them. If you have access to such a tool through your university, you can use it. ACRL offers Zoom to its committees through their [Virtual Meeting LibCal](#). Zoom allows participants to join audio via the computer or by phone, has robust screen sharing tools, and is easy to use.

If the ACRL Zoom option is not available, you can use the [free version of Zoom](#) for a free 40-minute meeting, with limitations on how many participants can enter. Other popular tools include WebEx, Skype, Google Hangouts, and Join.me. If you are using a virtual meeting tool for professional development webcasts, be sure to note the audio options for participants, how many participants can join, time limitations, and other limitations with free or university-sponsored web conferencing software. For a comparison chart of other web conferencing tools, please see [LITA's Virtual Engagement Toolkit Web Conferencing page](#).

Facilitating Virtual Meetings

Preparation

- Plan a detailed agenda.
 - It can be useful for this agenda to be in a Google Doc that can also double as a space for meeting notes. Ensure permissions on the Google Doc are set so that all participants can view (and possibly edit) the document.
 - Have well-defined, concrete outcomes and action items for the meeting, and write these into the agenda.
 - Consider what each person in the meeting will be doing at any given time. How is each person actively participating? If they will simply be listening the entire time, the information may be better conveyed through an email or other form of asynchronous communication.
 - Plan in advance how long you'll spend on each agenda item. This will ensure you cover everything on time.
 - Allow time at the beginning for introductions and building community, and at the end to solicit additional questions, review outcomes, and clarify action steps.
 - Build time for quiet reflection or writing, if necessary. This keeps certain people from dominating discussions over those who need to think first.
- Send the agenda out in advance of the meeting and solicit agenda items from participants. Also send along any necessary or helpful information for review prior to the meeting. This cuts down on the amount of meeting time devoted to informing and increases the time available for engaging conversation and idea-sharing.
- Send out a formal meeting announcement with a finalized agenda.

- Remember the outcomes that your committee has set in collaboration with your ACRL membership group. Keep those outcomes in mind when setting agendas for virtual meetings.
- If you are hosting virtual professional development meetings or webcasts through your ACRL section, consider creating a project management document of how you will be managing the events. For example, see the [ACRL ULS Professional Development Committee's ACRL LibGuide](#). This guide includes strategies for marketing, communicating events, and moderating large virtual meetings.

Running the Meeting

- Establish norms at the beginning of at least your first meeting with the group. Example norms:
 - Be mindful of your input. Share opinions, but don't monopolize the conversation.
 - Stay present. Don't multitask or walk away without explanation.
 - Should people keep their microphones muted?
 - Pros: Reduces background noise.
 - Cons: Discourages natural verbal back-and-forth.
 - How should people use the chat?
 - The chat can be good for quick comments and questions, particularly with larger groups.
 - Encourage people to stay on topic in the chat; side comments may be fine, but side discussions generally should be avoided.
- Encourage engagement from all participants.
 - Provide quiet/wait time to allow people to think.
 - Call on people often in an engaging and conversational way. This helps ensure that everyone gets a chance to participate and encourages engagement.
 - With larger meetings, consider having everyone write their thoughts in a Google Spreadsheet or a Google Doc, as people can do this simultaneously. Set up these documents in advance to save time.
 - For quicker questions, use the "hand raise" feature or polling feature to gather opinions.
- Avoid sharing your desktop unless it is necessary. It takes up a lot of screen space (making it more difficult to see faces) and makes it more difficult for participants to have the agenda or other collaboration spaces open.
 - If you do share your screen, avoid excessive scrolling or sudden movements, as these can be disorienting.
 - As an alternative, consider using a Google doc or sharing links, and having everyone open up those pages on their own computers.
- Keep the pace moving and the discussions on topic.
 - Use [lazy consensus](#); move forward even if you don't have 100% of people verbally agree. Read these [tips on building consensus](#) ahead of time.
 - Stick to the promised agenda and timing and finish the meeting early if possible.
- At the end of the meeting, summarize decisions and next steps. Ensure all outstanding tasks have owners and deadlines.

Follow-up & Assessment

- Send out brief meeting notes to your committee and ask for corrections.
- Post meeting documents in the appropriate locations in accordance with your ACRL membership group's guidelines (e.g., [ALA Connect](#)).
- Follow up on tasks and check in with the people assigned to do them before the items are due.
- Seek feedback from participants to help engage them in making sure the next meeting is even more successful.

Adapted from [Tips for Facilitating Virtual Meetings](#) from LITA's [Virtual Engagement Toolkit](#), adapted by and made by 2013 ALA Emerging Leaders and [2017 Emerging Leaders](#); portions adapted from [ALA LITA's Project Management page](#) from the [Virtual Engagement Toolkit](#).

Running Webcasts & Online Instruction

Communication and cooperation are crucial to successful webcasts and online instruction.

Working with Committee Members

Decide who will:

- Coordinate with presenters and ACRL staff.
- Give a formal introduction for the presentation.
- Collate questions and acknowledge receipt in chat.
- Serve as moderator and ask presenters questions from the audience.
- Act as technical moderator (e.g., facilitating breakout rooms, assisting with technical issues).
- Develop promotional materials.
- Send out promotional materials to each listserv.
- Create an evaluation form and link to the form.
- Conclude the presentation and ask for people to complete the evaluation.

Working with Presenters

Your committee will need to work closely with the presenters to:

- Finalize promotional materials and share with appropriate academic library listservs. Be sure to include presenter names and titles on all promotional materials and announcements.
- Provide at least one practice session to ensure technical proficiency and clarify overall flow (e.g., do they want 1 or 2 pauses for questions, who will be doing what during the presentation, should the video stay on for everyone even if they're not speaking, etc.).
- Determine methods for participation and engagement (e.g., polls or breakout rooms).
- Find a workable date and time for the practice session and the live webcast or instruction session. Be sure to be aware of how many participants the session will hold, and to test polling features, link access, and sharing presentations within the practice session. Provide

recommendations when necessary. Consider sharing a best practice document (e.g., [ACRL ULS best practices for online presentation guidelines](#)) with presenters.

Working with ACRL

Someone will need to work with ACRL to:

- Schedule acceptable dates for practice sessions and final presentations for webcasts.
- Make sure [ACRL's Zoom schedule](#) is clear for all sessions.
- Work out logistics.
- Determine what permissions attendees should have during the meeting (e.g., audio/video/chat).
- Determine when follow-up messages should go out and what they contain (e.g., supplementary info, presentation link, Microsoft PowerPoint slides).

Assessment of Webcast

- If hosting a large-scale virtual meeting or webcast, consider sending out an online assessment to participants to evaluate the program.
- Use online tools to create your evaluation of the session, such as Google Forms, Survey Monkey, or Qualtrics. Be sure to check the sharing settings on your survey so that everyone can access the form. Put the form in the chat and in the follow-up email to your participants.

The ACRL University Libraries Section (ULS) Professional Development Committee has a well-developed procedure on which this advice is based. For detailed info, please visit those pages: [ACRL ULS PDC: Committee Responsibilities: Organize and Execute Programs](#).

Project & Document Management

Document Management: Think about your file type and management system and stay consistent.

- Keep file names short and consistent.
- Do not use spaces in the file naming.
- Use a collaborative tool such as Google Docs, Office 365 Online, or DropBox in order to store documents; be sure to communicate with your ACRL membership group where documents are stored and conform to group bylaws and practices. For example, the ACRL Distance Learning Section (DLS) uses a Google Drive with a folder for every committee, with multiple editors from the committees on each folder.

Adapted from and for more information on document management, see [ALA LITA's Document Management](#) page from the [Virtual Engagement Toolkit](#) made by [2017 Emerging Leaders](#).

Troubleshooting & Tooltips

As with any technology, technical issues are inevitable, especially while facilitating online meetings on a large scale. It's important to have a plan B and sometimes even a plan C when interacting on virtual meeting platforms.

- **Prepare participants:** Encourage meeting attendees to install and test the platform being used beforehand: Checking audio and visual input settings prior to a meeting can help prevent issues during calls. Most applications such as Zoom, WebEx, Google Hangouts, and Skype Meetings automatically ask to test audio and visuals before each call begins. If you are the facilitator, make sure you are familiar with the virtual meeting tool.
- **Audio quality:** If possible, it may be worth investing in a quality headset for people who frequently use online meeting platforms. Laptop audio settings can be adjusted to accommodate those with hearing disabilities.
- **Use a webcam:** External webcams offer better resolution, less lag, and the best visual quality during your call.
- **Use a microphone:** Laptop microphone quality isn't usually preferable to an external microphone.
- **Wi-fi:** Make sure your internet is working properly to prevent lag and connect to a stable wi-fi service for virtual meetings. If hosting the meeting, using the virtual meeting mobile app or a Chromebook is not ideal.
- **Be flexible:** Technical difficulties can happen to anyone, so be patient with meeting attendees and be prepared to make changes to your meeting agenda accordingly. It may be helpful to have a collaborative Google Doc open during the call where people can take notes to compose meeting minutes for those unable to make the call or stay on during the entire duration of the meeting due to technical issues.
- **Record the meeting:** This will not only help someone who might be having technical problems but might also help all in case attendees need to review it.

For larger meetings, having a moderator that can help with technical issues in the background while the presentation is running is ideal. It's hard to troubleshoot the technical issues of your participants in a larger meeting, so please always remind them that the meeting or webcast is being recorded.

For more virtual meeting and webcast problems and troubleshooting tips, please see [ACRL's Instruction Section's Tips for Holding an Online Discussion Forum: Problem's to avoid section](#).

Tooltips for Zoom

- Update your name by clicking on the ellipsis in the upper-right corner of your ID rectangle. Add info such as your role in the meeting or your position in ACRL.
- Turn off/on your audio: Mac, ⌘Cmd+Shift+a and PC, Alt+a
- Turn off/on your video: Mac, ⌘Cmd+Shift+v and PC, Alt+v

- For host, mute everyone else: Mac, ⌘+Ctrl+M and PC: Alt+m
- Use the reactions and 'raise hand' to make the meeting engaging.
- Turn on closed captioning (CC) if needed.

Overall Resources & Links:

[ACRL's Instruction Section's Tips for Holding an Online Discussion Forum](#)

[LITA's Virtual Engagement Toolkit](#)

[ACRL University Library Section \(ULS\) Professional Development Committee LibGuide](#)