

## Virtual Meeting Tips & Tricks: Meeting Roles

Navigating a virtual meeting can be daunting, however, planning ahead and defining meeting roles and responsibilities can help! Check out the notes below to help in your planning process. Notes provided by Brendan Riley, Director of Policy at the North Carolina Community Health Center Association.

### - **Tech Lead**

- This role is a must. You will need someone who to host the virtual meeting platform, who sets up the meeting in advance, sets the security settings, monitors chat, etc. Who does what role depends on your staff's bench and individual strengths and comfort level.
  - Tech lead may also be the facilitator and timekeeper.

### - **Facilitator/Moderator**

- Facilitation as a skill is always important, but especially important to have strong and active facilitator for virtual meetings – filling up empty spaces, transitioning between speakers, etc. to reduce awkwardness.
  - And to make quick decisions if tech problems come up (e.g., intervene quickly to say “Hey I think you’re on mute” rather than waiting for them to realize it)
- If you’re behind schedule and about to introduce speaker 3 – set expectations “All right, I’m going to turn it over to XXX from CHC – we’re running behind, so could you...”

### - **Timekeeping**

- Timekeeping is a challenge — especially if it requires interruption. Even more difficult on a virtual meeting. Try to use subtle clues/hints (sometimes a private message to the speaker if they’re on their computer; Unmuting yourself to indicate that you are going to speak; etc.)
  - It’s never easy!

### - **Speakers**

- **Number of speakers**
  - People almost always want to speak for longer than they have time for
  - Back-and-forth/Q&A/discussion harder to come by in virtual setting, but we still want to make space for it.
  - With too many speakers, you may have to rush through a presentation and not have time for meaningful dialogue.
  - **For a 30-minute meeting, three (3) speakers/organizations is the sweet spot**
- **How do you pick who speaks?**
  - Mix of First-Come, First-Serve when setting run of show (who confirms attendance first)
  - Depends on focus of the meeting.
  - Depends on our ASKS:
    - Meetings in past year have been COVID-focused, so we’ve have multiple asks (telehealth; long-term CHC funding; short-term COVID funding for CHCs; etc.)

- For telehealth ask, we rely on our personal knowledge – which health center has great examples of telehealth utilization and process?
    - For Senators, we usually lean on our Board Government Affairs Committee, but if we have a more focused conversation, we may have a subset.
      - Example: talked with Senator Burr’s staff about 340B contract pharmacies – so we hand-selected some of our expert CHCs who utilize CPs
    - Sequencing: if you have someone who is really seasoned and expert at engaging with MOCs, it can help to have them go last as your cleanup hitter
  - **How many people attend?**
    - Depends on the MOC, their experience and history with CHCs.
      - For example, members who know our CHCs well and are champions tend to enjoy or not mind having lots of attendees in the virtual room; someone who is newer to CHCs and doesn’t have relationships built might prefer smaller environment.
    - Also depends on the district and how many CHCs are in it.
    - Try to emulate a more intimate conversation to allow for discussion & relationship-building.
    - Can be nice to have folks attend even if not having a speaking role so that they at least have some face time.
      - Can also ask them to share brief thoughts if MOC asks a question.
- **Tech and Zoom Tips**
- **How to connect?**
    - Use a computer for video meetings.
    - Use a phone for audio only meetings – if your internet slows down or cuts out, you’ll remain connected to the meeting, and folks will hear you (and you won’t get Porky Pig voice)
  - **Zoom Tips**
    - Waiting Room function is great – you never want to keep folks waiting too long, but it gives you an opportunity to get organized and adds an additional level of security.
    - Designate a co-host.
    - Chat –
      - Be careful about using – can be valuable for coordination mid-meeting and for timekeeping IF AND ONLY IF you’ve got a Zoom-savvy bunch.
        - Wouldn’t want to have someone inadvertently send to all attendees what they intended to be a private message.
      - There may be meetings where all the CHCs on computer and the MOC is on the phone.