Virtual Forum – Best Practices

1. Platform:

Popular apps to hold the meetings are listed below in the order of preference:

- Zoom
- Google Hangouts
- GoToMeeting
- Adobe Connect Pro
- Cisco Webex

Cost, hardware compatibility, registration pre-requisites and learning curve to operate are the factors influencing the list above. Consensus was Zoom is easiest, cheapest and effective.

This is for information only, but in no way restricts the Forums to any one platform. Like a physical Forum, the meeting place, time and format decisions are made by the members to suit their needs. Members who participate in Virtual EO Forum (VEOF) may have their personal preference.

Key to making this meeting work is to ensure all participants have a reliable internet connection. Bad connections are a distraction for everyone and diminish the experience.

2. In-person time:

Participants reflected that in-person meetings are fundamental in a virtual Forum setup. Either as meeting 1, to establish the parameters, constitution etc. or as retreats. An annual in-person meeting is recommended. The purpose of the in-person meeting is to create the relationships that build trust, connection and rapport, which when combined, enhance the levels of vulnerability that are possible. One EO member has been in the same virtual Forum for over 10 years and reports that this is their most vulnerable Forum. This Forum has a mandatory annual 3-night retreat. The option of two mini retreats annually was also mentioned as a successful option.

A 2-night annual retreat is considered the minimum (as per conventional Forum). Connecting in-person at Forum Bridge events in between virtual meetings is an option. This provides an opportunity for additional learning and connection time with your Forum buddies.

3. Meeting frequency, timing and logistics

As a best practice all Forums should hold monthly meetings.

Current virtual Forum participants hold meetings lasting between 1.5 and 2.5 hours. The average meeting time is 2 hours. At least two 10-minute breaks should be included in the agenda since focusing on one computer screen can be challenging over a long period of time.

Timing is a critical function for an effective meeting. The appointment of a meeting manager is recommended, in addition to the moderator. The emphasis for the manager is to maintain scheduling, while the moderator will manage interaction.

A critical component is that the participants should be in a private space, with no interruptions for the duration of the meeting to maintain confidentiality and prevent distractions.

4. Membership:

Most current virtual Forums have 6 to 8 members. Fewer members can limit the value, while a larger group can increase the meeting time. It is valuable and important to be able to see all members of the Forum on the screen all the time.

5. Agenda

Time	Agenda Item	Notes
5 min	Moderator's welcome	
5 -10 min	Clearing round	
10-15 min	Conversation starter	
4 -8 min each	5% reflections with resonance or confirmations	5% reflections must be completed and submitted to the moderator 24 to 48 hours before Forum meeting is recommended. This should be circulated prior to the meeting.
45-60 min	Deep dive	Traditional format, moderator leads the rounds tightly
10 min	Parking lot	
15 min	Housekeeping	
5 min	One word close	

6. Constitution

The constitution covers the structure of the meeting, the actions and participation of the members and the consequences of deviation from the agreed parameters. Areas of extra consideration should include preparation, attention and access to technology and other electronics.

The key success of a virtual meeting is the adherence of the **Trust and Respect** value of EO, particularly in staying present rather than being distracted by extra stimuli hidden from the other participants. It is recommended that one person on the call monitors the participant's attention and has permission to call people out if they see them doing something else. Everyone must be on video, audio only participation is not allowed.

7. Clearing

Current virtual Forum participants stress the value of holding a clearing round. As an addition to the agenda, there is an option to hold a clearing session at the beginning AND at the end of the meeting. Since attendees are not physically together, it easier to decide not to share a concern. Providing two opportunities increases the likelihood that participants will share.

8. 5% Reflections

5% Reflections should be completed and circulated the day before the meeting, so that participants can review the submissions prior to the meeting, allowing more active listening to the "significance" component during each participant's turn. This is where the value lies and thus will allow other participants to listen for additional deep dive opportunities.

To keep attention levels high, allow a 30 second "breather" between turns to allow participants to refresh attention between speakers, by shifting and reengaging.

9. Additional Resources:

https://hbr.org/2017/03/how-to-raise-sensitive-issues-during-a-virtual-meeting
https://www.inc.com/guides/2010/12/5-tips-for-conducting-a-virtual-meeting.html
https://hbr.org/2016/04/what-everyone-should-know-about-running-virtual-meetings
https://hbr.org/2015/03/how-to-run-a-great-virtual-meeting
https://hbr.org/2012/05/the-right-way-to-run-a-virtual
https://hbr.org/2011/03/how-to-conduct-a-virtual-meeti
https://www.nten.org/article/9-best-practices-engagement-virtual-meetings/