



ASHRAE Virtual Meeting Guidance

Tips for Hosting a Successful Virtual Event

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Table of Contents

General Tips	3
Meeting Facilitator.....	3
Hosting a Virtual ASHRAE Business Meeting	4
Before the Meeting.....	4
During the Meeting:.....	4
Hosting a Virtual ASHRAE Meetings with a Main Presentation.....	5
Three Weeks Before Meeting	5
1 Week Before Meeting.....	5
Day Before the Meeting.....	5
After the Meeting	5
Tips for Speakers and Presenters.....	6
Before the Meeting.....	6
Speaking.....	6
Hosting a Virtual Special Occasion ASHRAE Event.....	7
Appendix	8
Template: Technical Agenda.....	9
Template: Email to Attendees with Virtual Meeting Tips.....	10
Tips for Successful Video in Virtual Meetings.....	11
More Tips for Hosting a Successful Virtual Meeting.....	11

General Tips

- Have a **Virtual Meeting Housekeeping** agenda item at the beginning to address virtual meeting protocol. See guidelines below under Hosting a Virtual ASHRAE Business Meeting.
- Video/webcam use is strongly encouraged** - it allows attendees to see visual cues such as body language and engagement.
- Mute** – Remind attendees to mute themselves unless they need to speak. Optionally, the meeting facilitator can mute everyone to start and announce how to make comments.
- Listening/speaking** – use headset or earpiece to minimize your ambient noise interference when unmuted.
- Designate a Facilitator** - Good facilitation is critical to a successful virtual meeting. See below under Meeting Facilitator.
- Use Chat** – For quick answers (yes, no, agree, disagree, etc.) and other comments.
- Meeting Length** – Trim your agenda and take breaks every 40 minutes. It is more difficult for most people to stay engaged during a long virtual meeting.

Meeting Facilitator

Good facilitation is critical to a successful meeting. Decide ahead of time who will facilitate your virtual event. For smaller meetings, the person chairing the event may be able to facilitate. Meetings larger than 10 people should have a dedicated facilitator.

Facilitator responsibilities:

- Join meeting 30 minutes ahead of time
- Confirms arrival of all presenters, especially speakers
- Test sound, video, and mute functions for all presenters
- Share screen for introduction slideshow, and advances slides as needed
- Manages the “pass off” between presenters if needed
- Handle mute/unmute of attendees as necessary
- Monitor chat
- Monitor agenda, ensure people are stepping in when necessary
- Monitor meeting elapsed time
- Review/prepare “welcome/housekeeping slides”

Who makes a great facilitator?

- Well-versed in meeting software
- Familiar with the content of the meeting
- Examples:
 - For a TC Meeting – Secretary or Vice-Chair
 - For a Chapter Event – CTTC Chair or Programs Chair
 - For a Society Committee Meeting – Staff Member

Hosting a Virtual ASHRAE Business Meeting

Before the Meeting

- Send [virtual meeting tips](#) to attendees
- Identify [meeting facilitator](#)
- Establish break times and lengths

During the Meeting:

- Start with Virtual Meeting Housekeeping** – explain these items:
 - Ask people to identify themselves anytime they speak
 - "This is Pam Duffy from Region VIII"
 - How to mute and unmute on your platform.
 - "We can hear very tiny noises like keyboard typing."
 - Attendees may be asked to mute, or that the facilitator may mute them
 - "Jessica, we can still hear your audio. Can you please mute your line?"
 - "Jessica, I muted your audio."
 - Use the Chat box instead of speaking when:
 - For quick answers (yes, no, agree, disagree....) or sharing a hyperlink
 - Stepping away from the meeting
 - Audio or video quality problems
- Taking Attendance**
 - Use the Member Roster and compare with the platform attendee list to identify attendance. Ask attendees to turn on audio and video when their name is called.
 - "Heather, I see you're online. Are you connected to audio?"
 - Have attendees to use the chat function to provide feedback to the moderator/speaker
 - "Your audio is quiet; can you try to adjust your settings?" I'll come back to you shortly to try again."
- Motions and Voting**
 - Acknowledge specific individuals by name for discussion.
 - "Karine, would you like to comment on this topic?"
 - "Ken, would you like to make the motion?"
 - Call for the vote.
 - Voice vote – "All in favor, say 'aye.' All opposed, say, 'no.'" There is no need to ask these questions separately.
 - Roll call vote – Any voting member (including chair) can request a roll call vote.
- Timing**
 - The chair should be cognizant of the time and make periodic announcements.
- Breaks**
 - Instruct people to mute/turn off video during breaks.
 - Put break end time up on the screen.

Hosting a Virtual ASHRAE Meetings with a Main Presentation

Three Weeks Before Meeting

- Assign a [Facilitator](#)**
- Confirm the platform to be used**
 - GoToMeeting and GoToWebinar are available free of charge from ASHRAE.
 - Learn more about how to reserve: <https://www.ashrae.org/emeetings>
 - If the platform has a cap on the number of attendees, add a cap on your event registration.
 - If the platform requires attendee registration, include registration information in promotional materials.
- Confirm how attendees will receive the joining information.** Will it be sent automatically from the platform or will a volunteer need to send?
- Consider** incentives for members to attend the meeting live, like a raffle or giveaway.
- Share** virtual meeting details with “sister” chapters or other chapters in your region that may be interested.

1 Week Before Meeting

- Create an **Event Agenda** (see template below) and confirm details with all participants.
- Speaker Coordination**
 - Remind speaker to join the virtual meeting 30 minutes before start time for a technical test.
 - Confirm if recording the presentation is acceptable and get permission in writing.
 - Share technical agenda with speaker.
 - Discuss how questions will be handled. Using chat for Q&A is recommended.
 - Request presentation for [commercialism review](#). Refer to the [Manual of Chapter Operations](#) Appendix 5A to understand possible challenges. Ensure the [facilitator](#) has the ability end the live presentation if necessary.
- Create online event survey** (Google Forms, Survey Monkey)
 - Look for an option to make a downloadable PDF available upon survey completion. This way, event attendees must fill out the survey to receive their PDH.

Day Before the Meeting

- Re-confirm agenda with speaker and presenters.
 - Introduction and conclusion
 - How pass-offs will happen
 - Q&A
- Email virtual meeting tips to attendees.

After the Meeting

- If you used a shared meeting platform with common login information, log out of the platform.
- Email the event survey.
- Email PDH certificates.
- Publish recorded presentation if you have permission.

Tips for Speakers and Presenters

Before the Meeting

- **Video**
 - Check our webcam video tips in the [Appendix](#)
- **Audio**
 - **Ensure high quality** audio from your microphone by testing ahead of time with the meeting organizers.
- **Test**
 - Use the platform setup to adjust your camera BEFORE the meeting.
 - Some platforms have test connections to do this when convenient.
- **Confirm Logistics**
 - Confirm logistics for screen sharing.
 - Confirm with meeting organizers how Q&A will work.
 - Determine who to “pass” the presentation back to once you are done presenting.
- **Prepare Presentation**
 - Concise presentations are more successful.
 - A virtual presentation can extend longer than a live presentation.
 - A good rule of thumb for virtual presentations is 2 minutes per slide. That is 30 slides maximum for a 60-minute presentation.
 - Maintaining audience engagement is more difficult in a virtual presentation.
 - Use built-in polls in GoToMeeting or responses in chat to encourage engagement during your presentation.
 - Plan for an engagement activity once every 5 minutes.
- **Rehearse**
 - Look at camera, not computer.
 - Record yourself to check your audio and video quality.

Speaking

- Ensure the presentation file is the version approved by the meeting organizers that is in compliance with the [ASHRAE Commercialism Policy](#)
- **Consider standing** during the presentation.
- **Eye Contact**
 - Look at camera as much as possible.
 - Add a sticky note to your camera with a friendly reminder that says, "look here!"
- **Keep it Engaging and Read the Proverbial “Room”**
 - Ask for written feedback, “Type yes into the chat if you agree”
 - Ask for visual feedback, “Give a thumbs up to the camera if you agree”
- **Q&A**
 - Build in "question pauses" in the presentation to ask and answer questions
 - Know that questions will be at the end of the presentation

Hosting a Virtual Special Occasion ASHRAE Event

- ❑ **Designate a [Meeting Facilitator](#)**
- ❑ **Create an Agenda**
 - It may not be a meeting, but you still need structure! Take a look at the [technical agenda](#) for ideas.
 - Remember that virtual events are more engaging with more speakers. Ensure that there are plenty of pass-offs.
 - Designate a clear “end time” and plan how to close out the event on a high note.
- ❑ **Slide Deck –**
 - Use the [opening slides template](#) with housekeeping items.
 - Add plenty of photos of those being recognized at the event or other memories.
- ❑ **Attire** – Encourage attendees to dress up for the occasion.
- ❑ **Theme** – Consider an event theme like superheroes, 80s, under the sea, and encourage people to decorate and dress accordingly.
- ❑ **Group Picture** – Make plans to take a group picture via screenshot (of award winners, or all attendees).
- ❑ **Music** – Create a playlist and sharing music upon entry.
- ❑ **Presentation of Physical Items** – Ship items as needed (plaques, trophies, etc.) with the express instructions to NOT open the box, but to be prepared to open the box during the meeting.
- ❑ **Activity** – Consider a group activity to engage people. Some ideas:
 - Trivia using built-in polling or another tool like [Poll Everywhere](#)
 - Scavenger Hunt (“Show us something with the ASHRAE logo!”)
 - Bingo
 - Hire a Professional Comedian or Live Music
 - Virtual Dance Party; for example, [learn a line dance!](#)
- ❑ **Extend the Invite** – Extend the invite to family, friends, and pets!
- ❑ **Drinks** – If your event would normal be accompanied by a happy hour, consider one of these ideas:
 - Have a themed cocktail and mocktail recipe that you have sent ahead of time to attendees.
 - Encourage attendees to bring their favorite beverage to the event.
 - Plan opportunities for toasts or cheers.
- ❑ **Meals** – If your event would normal be accompanied by a meal, consider one of these ideas:
 - Send a suggested menu with recipes and encourage attendees to prepare ahead of time and eat on the call.
 - If you have sponsors, you can have a food delivery service (DoorDash, Uber Eats, Postmates, etc.) delivered to the attendees so they can all share a meal or have a drink.
 - If you have sponsors, you can have sponsors issue gift cards to a food delivery service (DoorDash, Uber Eats, Postmates, etc.) and have attendees order after the meeting.
 - Utilize your platform’s “break out room” function so people can talk together like they are sitting at a round table at the event for real. Provide prompt questions for people to discuss at their breakout.

Appendix

- [Template: Technical Agenda](#)
- [Template: Email to Attendees with Virtual Meeting Tips](#)
- [Tips for Successful Video in Virtual Meetings](#)
- [More Tips for Hosting a Successful Virtual Meeting](#)

Template: Technical Agenda

	Responsible	Details
Entry – before meeting starts	Facilitator	<ul style="list-style-type: none"> <input type="checkbox"/> Display Welcome slide and share screen to attendees <input type="checkbox"/> Verify attendees can see the shared screen <input type="checkbox"/> Welcome people as they arrive. <input type="checkbox"/> Announce meeting start - on time
Housekeeping Announcements	Presenter	<ul style="list-style-type: none"> <input type="checkbox"/> Discuss virtual meeting housekeeping announcements. <input type="checkbox"/> When finished, introduce the next presenter, “Now I’d like to pass it off to, <volunteer name>”
Welcome and Meeting Announcements	Presenter	<ul style="list-style-type: none"> <input type="checkbox"/> Make remarks. <input type="checkbox"/> When finished, introduce the next presenter, “Now I’d like to pass it off to, <volunteer name>”
Introduce Speaker	Presenter	<ul style="list-style-type: none"> <input type="checkbox"/> Make remarks. <input type="checkbox"/> During introduction, Facilitator gives access for speaker to share their screen <input type="checkbox"/> When finished, the programs chair says, “It looks like we can see the presentation deck, so now I’d like to pass it off to, <speaker name>”
Presentation	Speaker	<ul style="list-style-type: none"> <input type="checkbox"/> Make presentation.
Q&A	Facilitator	<ul style="list-style-type: none"> <input type="checkbox"/> Facilitator asks questions from chat as time allows. <input type="checkbox"/> If needed, changes “share screen” from presenter back to Technical Moderator, to share the final “Concluding Remarks”. <input type="checkbox"/> When finished, says, “That’s all the time we have for questions. I’d like to turn it over to <volunteer name> for some final remarks.”
Concluding Remarks	Presenter	<ul style="list-style-type: none"> <input type="checkbox"/> Makes final remarks <input type="checkbox"/> Facilitator ends the meeting for all attendees



Template: Email to Attendees with Virtual Meeting Tips

We will be hosting our upcoming meeting virtually. <Enter information here on how to join the meeting, like the hyperlink>.

Here are tips to help make the meeting successful for everyone:

Audio:

- Connection Type:** ensure the meeting control panel is set to the correct audio input and output device.
- Ensure clear audio.** Use a connected or Bluetooth headset or earbud with microphone.
- There is no need to announce your arrival to the meeting.** We will do a roll call and when your name is called, please unmute yourself to reply.
- Ensure you are muted** unless you need to speak. Always keep the mute on even if you think you are not making noise, the group can hear everything. Use the mute function within the meeting platform instead of any mute functions on your audio hardware. A facilitator may mute your line for you if the audio is distracting to the meeting.

Video:

- Webcam video is encouraged.**
- Adjust your Camera Height** – Camera height should be eye level. Use books, boxes, or a laptop stand to raise the height of your camera.
- There is no need to get fancy.** Wear something you would not be embarrassed by if you ran into your boss at the grocery store!

Chat:

- Use Chat** instead of speaking when:
 - For quick replies (yes, no, agree, disagree.)
 - Stepping away from the meeting
 - Sharing a hyperlink
 - Audio or video quality problems

Finally, be sure to check all your settings before joining the meeting!

New to online conferencing? Here are some tips:

Test your equipment with these helpful links (GoToMeeting)

- [Test System Compatibility](#)
- [Test Your Mic and Speakers](#)
- [Test Your Webcam](#)

Joining the Meeting:

- [GoToMeeting Attendee Quick Start](#)

Tips for Successful Video in Virtual Meetings

- ❑ **Lighting** – good lighting is key! Make sure you are positioned with enough light.
- ❑ **Eye Contact** - try to look at camera as much as possible. Add a sticky note to your camera with a friendly reminder that says "look here!".
- ❑ **Read the Room** - Be intentional about asking people for feedback on specific items. People can give a thumbs up if they agree.
- ❑ **Adjust your Camera Height** – Camera height should be eye level. Use books, boxes, or a laptop stand to raise the height of your camera.
- ❑ **Be Camera Ready** – There is no need to get fancy, but please look presentable. Wear something you wouldn't be embarrassed by if you ran into your boss at the grocery store. Wear pants!

More Tips for Hosting a Successful Virtual Meeting

Avoid FOUM (Fear of Un-Muting) and EUMAO (Everyone Un-Mutes At Once)

Virtual meetings with a lot of people can feel awkward if everyone is muted and they are not sure when to unmute in order to speak. These long pauses, Fear of Un-Muting (“FOUM”) can make virtual meetings feel long and labored.

When there is an open ended question (“can everyone see my screen?”, “does anyone have any questions?”) and a lot of people answer at once, every stops and starts talking at the same time and then tries to cede the floor at the same time. This phenomenon, Everyone Un-Mutes At Once (or “EUMAO”) is even worse than FOUM.

It is the job of the meeting facilitator (person doing the presentation at that time) to avoid FOUM and EUMAO.

- ❑ **Questions that call on the whole group.**
 - These are questions like, “Are there any questions?”, “Is everyone okay with tabling this topic?”
 - Ask people to direct their answers to the chat rather than unmute. “Please reply using chat if you are OK to table this topic.”
- ❑ **Questions that require someone to chime in:**
 - These are questions like, “Who would like to volunteer?”, or “I will entertain a motion...”
 - Instead, ask someone by name if they will take on this task, like “Ken, would you like to make the motion?” or “Kay, can you take on that task?”
- ❑ **Use people’s names frequently.**
 - Ask for direct feedback by person, “Randy, do you have any comments or questions on this item?”