

# Best Practices for Remote Facilitation

ServeMontana Symposium

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## Group Discussion and Brainstorms

Tips and best practices for Conference Calls, Webinars, and Video Conferencing

<b>Conference Calls</b>	
<b>Do (group 1)</b>	<b>Don't</b>
<ol style="list-style-type: none"><li>1. Have a time limit</li><li>2. Agenda and stick to it</li><li>3. Take roll by name</li><li>4. Ask specifically for updates</li><li>5. For large numbers, use service with aps</li><li>6. Remind about muting</li><li>7. State name and then comment</li><li>8. Confirm and highlight decisions and comments</li><li>9. Follow up with email</li><li>10. Send supplemental materials</li></ol>	<ol style="list-style-type: none"><li>1. Don't wing it</li><li>2. Don't forget to be mindful of speakers (background noise, heavy breathing, etc)</li><li>3. Don't assume participants know you your voice (introduce yourself)</li><li>4. Don't waste peoples time</li><li>5. Don't get side tracked on one on one conversations</li></ol>
<b>Do (group 2)</b>	<b>Don't</b>
<ol style="list-style-type: none"><li>1. Agenda</li><li>2. Be efficient with communication</li><li>3. Mute/Background noise</li><li>4. Flexibility/Accommodation of Schedules</li><li>5. Review Commitments</li><li>6. Plan ahead for a quiet space</li><li>7. Choose purpose</li></ol>	<ol style="list-style-type: none"><li>1. Don't be a conversation hog</li><li>2. Waste time</li><li>3. Think out loud</li></ol>
<b>Resources</b>	
<ul style="list-style-type: none"><li>• Freeconferencecall.com</li><li>• Google Voice</li><li>• Wiggio</li></ul>	

<b>Webinars</b>	
<b>Do</b>	<b>Don't</b>
<ol style="list-style-type: none"> <li>1. 5 P's- Proper Preparation Prevents Poor Performance               <ol style="list-style-type: none"> <li>a. Close unrelated screens</li> <li>b. Pull up necessary screens</li> <li>c. Provide advance notice</li> </ol> </li> <li>2. Get people to participate               <ol style="list-style-type: none"> <li>a. Ask in advance to share specific stories</li> <li>b. Ask folks to type in questions</li> </ol> </li> <li>3. Consider muting               <ol style="list-style-type: none"> <li>a. *6</li> <li>b. All mute</li> <li>c. Individual mute</li> </ol> </li> <li>4. Rehearse</li> <li>5. Use Pictures!               <ol style="list-style-type: none"> <li>a. That are applicable</li> <li>b. Try for funny! (flickr)</li> </ol> </li> <li>6. Participate in other's webinars</li> </ol>	<ol style="list-style-type: none"> <li>1. Read from script</li> <li>2. Avoid pauses</li> <li>3. Set up culture where folks don't feel as though they should participate</li> <li>4. Create/have text heavy slides</li> <li>5. Have super long webinar               <ol style="list-style-type: none"> <li>a. Suggestion: 1 Hour</li> </ol> </li> <li>6. Avoid lunch hour</li> <li>7. Check presenter energy sweet spot (don't schedule for when you'll be tired)</li> </ol>
<b>Resources</b>	
<ul style="list-style-type: none"> <li>• TechSoup</li> <li>• Join.me (free webinar platform)</li> <li>• Whenisgood.com (scheduler)</li> <li>• Doodle (scheduler)</li> <li>• Flickr (photos)</li> </ul>	

<b>Video Conferencing</b>	
<b>Do</b>	<b>Don't</b>
<ol style="list-style-type: none"> <li>1. Be fair</li> <li>2. Be inclusive</li> <li>3. Be aware of the technology</li> <li>4. Pay attention to the mute button</li> <li>5. Be aware of limitations, like firewalls that prevent viewing of YouTube videos</li> <li>6. Have a plan B</li> <li>7. Do a test run!</li> </ol>	<ol style="list-style-type: none"> <li>1. Give pre-homework</li> <li>2. Forget that people are watching</li> <li>3. Don't be a distraction</li> <li>4. Be mean</li> </ol>
<b>Resources</b>	
<p><i>Free Video Groups:</i></p> <ul style="list-style-type: none"> <li>• Google Hangouts</li> <li>• Skype Groups</li> </ul> <p><i>One on One:</i></p> <ul style="list-style-type: none"> <li>• Google video chat</li> <li>• Skype</li> <li>• Facebook</li> <li>• Facetime</li> </ul>	<p><i>Location based services:</i></p> <ul style="list-style-type: none"> <li>• Libraries</li> <li>• Schools/University System</li> <li>• Public Offices (SummitNet from ITSD)</li> <li>• Hospitals</li> <li>• Private systems that allow nonprofits to use (like First Interstate Bank)</li> </ul>