

Introduction to Virtual Facilitation for Collaboration

As NACCHO and our members adjust to teleworking during the COVID-19 response, we are all navigating new territory when it comes to finding virtual alternatives for in-person collaboration. To address this challenge, NACCHO has identified some resources, strategies, and tools that local health departments and their partners can use to design and facilitate virtual collaborative activities.

This introduction to virtual facilitation and collaboration offers practical solutions and best practices for virtual collaborations. This guide is meant to be an introduction and overview to some common virtual facilitation processes and will not go into detail on specific facilitation strategies.

We hope that this guide will help you and your team get the most out of your upcoming virtual events.

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Section 1: Five Principles of Effective Facilitation

The following principles are key for any facilitated event and become even more important during virtual facilitation.

Principle 1: Plan your agenda: The agenda is the foundation of meeting planning. It outlines your meeting goals, key decision points, and provides a timeline to keep the group on track. Depending on the complexity of your event, you may have both a participant agenda and a facilitators' agenda. The participants' agenda lists the topics and activities that make up the meeting. The facilitators' agenda expands on those topics and activities with talking points and activity descriptions.

- **Plan thoughtful meeting goals:** Meeting goals focus on what you would like to achieve from your event. Consider goals related to both the work you hope to achieve (Ex. "Identify priorities for our 2020 action plan") and what you hope participants will experience (Ex. "Build a sense of collaboration" or "Increase trust among members").
- **Consider content and process:** When planning the agenda, consider both the content and processes that will go into the agenda. Content is what gets talked about at the meeting, and frequently relates to your work-related goals. Process is how you will achieve these goals and includes the activities that make up your agenda, such as the specific activities you plan for brainstorming or voting techniques (See section 4: Virtual Activities: Considerations and Techniques). Take time to think about your goals and objectives and consider, "What content do we need to cover to achieve this goal/objective?" "What outputs do we need to achieve this goal/objective?" and, "What process or processes could be used to achieve this output?"
- **Construct your agenda:** Use your goals, content, and processes to build your agenda. You should be able to clearly answer the following: "What you are trying to achieve?" "How you will achieve it?" "How long it will take?" and, "Why have chosen each process or activity on your agenda?" See "[How to Build Your Agenda](#)" for more tips on agenda building as well as an example template. As you are putting together your agenda, ask yourself:
 - Does this connect back to the goals and objectives?
 - Is this an appropriate process to achieve the goals and objectives?

Principle 2: Plan for individual preferences: For all participants to fully engage, it is helpful to consider individual participant's preferences for processing information and group participation. Below are some design considerations for different [participant attributes](#) that impact participant's motivations, needs, and preferences. The best designed events take all of these into consideration. While every activity may not appeal to everyone, all participants will be able to engage in at least one activity.

We often tell participants, "As we go through the event, there will be some things you love and some things that stretch you beyond your comfort zone. Try to stay open to activities that are new or uncomfortable for you as we all move through this process together." Sharing this with participants, can be helpful in respecting that they may not be comfortable with all the activities and helping them

embrace the activities that are outside of their comfort zone, rather than shutting down when faced with something new or uncomfortable.

Participant Attribute	Design Considerations
<p>Analytical: Want to know what they will gain from the event. Interested in relevancy, clarity, and direct outcomes. Expertise and qualifications are important to them.</p>	<ul style="list-style-type: none"> ● Define clear goals and expectations ● Connect goals with participants' own needs ● Practice content, facilitation, and technology ahead of the meeting to demonstrate competence
<p>Structural: Appreciates guidelines and predictability. Learns best through hands-on experience.</p>	<ul style="list-style-type: none"> ● Share the agenda and handouts in advance ● Stick to the agenda ● Provide opportunities before, during, or after for direct hands-on participation
<p>Social: Socially aware, considers the needs and actions of others.</p>	<ul style="list-style-type: none"> ● Use participant's name ● Include group activities ● Demonstrate ideas using relatable stories
<p>Conceptual: Intuitive about ideas and forward thinking. Easily bored without variety.</p>	<ul style="list-style-type: none"> ● Include visuals and images throughout your event ● Allow space for brainstorming and idea generation
<p>Expressiveness: How individuals both process and express their thoughts. Some need to talk out information in order to understand it. While others need time to collect and organize their thoughts on their own before sharing.</p>	<ul style="list-style-type: none"> ● Create a balance between large group discussion, small group discussion and individual reflection ● In a virtual setting, consider: <ul style="list-style-type: none"> ○ Small group discussions: Groups assign an individual to present out. This allows more introverted individuals to share in their small groups, while allowing more extroverted members to share with the larger group. ○ Polls: Gather information from everyone without the need for discussion.
<p>Assertiveness: Reflects how quickly participants prefer to move through content. Some will prefer to make decisions quickly, while others will want to spend more time in discussion.</p>	<ul style="list-style-type: none"> ● Clearly define group norms and expectations for decision making ● Plan in the agenda and communicate the amount of time dedicated to discussion
<p>Flexibility: Describes participants' acceptance of discussing alternatives and making changes once a decision has been made. Some prefer to finalize a decision and move forward; others prefer to consider alternatives.</p>	<ul style="list-style-type: none"> ● Clearly define group norms and expectations for decision making

Principle 3: Employ adult learning principles: Adult learning principles outline the unique ways that adults learn and process information. It is important to take these principles into account when planning your agenda to ensure that participants connect with the content and can fully participate.

Adult Learning Principle	Design Considerations
<p>Independence: Adults self-direct their behavior, allowing them to take responsibility for their learning</p>	<ul style="list-style-type: none"> • Provide guidance and support for participants throughout the activity • Leave space for participants to steer conversation and make decisions independently • Consider activities that use tools such as the whiteboard feature and collaborative documents (see Section 3: Video Conference Platforms and Functions), which allow for direct participant involvement.
<p>Experience: Adults draw from and learn best when learning is applied to their own experience</p>	<ul style="list-style-type: none"> • Reflect on the skills, experience, and insights that your participants bring in planning the agenda • Include activities that draw on individual and collective experience • Create time during introductions or ice breakers for individuals to share the experience they bring to the group
<p>Readiness to learn: Adults learn and engage best when content is related to their personal and/or professional development</p>	<ul style="list-style-type: none"> • Clearly communicate the event’s goals before, after and during, the event • Plan activities that help participants to see their personal and professional connection to the goals • Use ice breakers and introductions purposefully to demonstrate connection
<p>Knowledge-focused: Adults purpose for learning is often to gain specific knowledge and/or solve specific problems</p>	<ul style="list-style-type: none"> • Ground activities in real-world information rather than hypotheticals • Build in time for participants to apply knowledge learned through individual exercises, small group, or large group discussion
<p>Internally Motivated: Adults are motivated to learn by their own values, needs and desires</p>	<ul style="list-style-type: none"> • Communicate how your event’s goals connect to participant motivations (See above “Plan for all learner preferences”)

Principle 4: Plan for group dynamics: While you have already considered individual participant characteristics, it is also important to consider the group dynamics. Understanding and planning for group dynamics can make or break your event. [Four key strategies](#) to understanding group dynamics include:

- Create clear expectations via norms and expectations
- Recognize how personalities affect team dynamics
- Understand the [life cycle of a team](#)
- Create clear paths for respectful communication

Common Challenges	Design Considerations
Some participants may not know or be comfortable with other participants	Identify icebreakers and team building activities that: <ul style="list-style-type: none"> • Relate to the meeting content • Create progress toward your goals For ideas for virtual ice breakers see: Virtual team building activities and Virtual icebreakers.
Known conflict between two or more participants	<ul style="list-style-type: none"> • Set ground rules for how you will handle conflict or disagreement is important for any event • Refer to ground rules early and often • Use strategies like small group discussion, the chat function, and polling that minimized direct discussion between the two potentially conflicting parties
Power dynamics	<ul style="list-style-type: none"> • Review the Interaction Institute for Social Change’s “Power Dynamics: The Hidden Element to Effective Meetings” which provides an overview of power dynamics in meetings and recommendations on addressing power dynamics applicable to in-person and virtual formats
Balancing personalities	<ul style="list-style-type: none"> • See ‘Introversion and Extroversion’ under ‘Plan for All learners’ for additional considerations.

Principle 5: Plan for facilitation: You have spent a lot of time thinking about your agenda and your participants, however; it is also important to think about your own role as facilitator. The facilitator sets the tone for the event and ensures a comfortable environment where participants can share freely. Remember, [developing facilitation skills](#) requires practice, practice, and more practice!

The job of a facilitator is to help the group achieve its goals by guiding them through an efficient and productive process, while maintaining an open environment and keeping an eye on group dynamics. Facilitators emphasize process design and group interaction techniques to design a sound process. Facilitation requires verbal and non-verbal skills to keep the group on track. [Focused conversation](#) is one framework that might be helpful for structuring your processes.

Facilitator role	Considerations
Design the right group process.	<ul style="list-style-type: none"> • Find the structure that will help the group think effectively. This may be an open or structured discussion, in which you use different techniques to help the group exchange viewpoints, analyze issues, generate ideas and make decisions • Use the above principles and tips to create a sound agenda that will help you stay confident and make adjustments as needed during the event
Remain neutral.	<ul style="list-style-type: none"> • Highlight participants' ideas, not to contribute to or influence them. • Demonstrate that you trust them to achieve the goals and objectives by ceding the floor to them
Guide and control the event	<ul style="list-style-type: none"> • Shape and guide the process of effective collaboration • Set the ground rules • Run through the objectives and agenda • Keep up the momentum and energy • Listen and engage • Monitor checkpoints and summarize
Consider what-if scenarios.	<ul style="list-style-type: none"> • Rehearse how you will resolve conflict to keep the focus on the group's needs, while also considering feelings of both parties involved in the disagreement
Always check back with the group.	<ul style="list-style-type: none"> • It is important to stick to the agenda, but you should also check back after each major section to see if there are any questions or additional clarity needed before moving on

Section 2: Considerations for Going Virtual

Be familiar with technology: Just as you plan for the tables, chairs and overall physical space of an event, planning for and being familiar with technology is essential for successful virtual meetings.

- **Facilitator:** The facilitator has the responsibility of conducting the meeting in the virtual space. The following are tips and resources to ensure that you are ready for success when you launch your virtual event:
 - Test your technology before the meeting and resolve any technical issues
 - Use a [virtual meeting checklist](#) and/or [virtual meeting planner](#) to ensure you address each detail of your virtual set-up
 - Designate a tech troubleshoot (someone other than the facilitator) to support you and the participants with the technology throughout your event
 - Use features that you can use comfortably and explain clearly
 - Have a back-up plan for any activities that rely on technology or platform functions
 - Allot time in the agenda for technology challenges so that they do not derail the event
 - Keep things fun and interesting, while also recognizing that technology challenges and snafus happen with [virtual meeting bingo](#)
 - Conduct a [test meeting](#) with all facilitators, contributors, and event leads to practice connecting audio and video, sharing content, and using the participant and chat panels
- **Technical and notetaking support:**
 - Test technology before the meeting and ensure there is a back-up plan for any glitches
 - Create a plan for communication between the facilitator and support persons
 - Have needed materials on hand and be ready to use them (e.g. if the note taker is responsible for compiling input during a break, have the template ready to be populated)
 - Participate in a test meeting with all contributors
- **Participants:** Your participants may have varying levels of familiarity and comfort with technology, as well as the specific platforms and functions that you use. If participants are not comfortable or able to use the platform or functions you use, they are far less likely to engage. You can use one or a combination of the following techniques to increase participant familiarity and comfort with technology:
 - Send out instructions to participants in advance of the meeting with information on the technology you will be using. Consider how features may appear on different devices (computer, phone, etc.). Provide a list of supplies they will need on hand (pen, paper, etc.). These are two example introductory materials:
 - Ex. [Participant welcome and orientation from Technology of Participation](#)
 - Ex. [Best practices for participants](#)
 - Review all technology that you will use and allow participants to ask questions at the beginning of the event
 - Include a quick review of the technology before you start each activity
 - Introduce participants to the designated technology troubleshooter and describe how they can request assistance throughout the event

Use video: Voice-only calls can limit the level of collaboration, reduce engagement, and hamper team dynamics, all of which are critical for a successful virtual event. With video, participants can “read the room” by interpreting facial expressions and social cues, increasing collaboration, engagement and team building. Most virtual platforms include the option for video. Before hosting an event with video, share these [considerations for making the video calls](#) to increase participant familiarity. Test video before the meeting to ensure that the camera is working correctly.

Use built-in tools strategically: In addition to video, many virtual platforms have a number of built-in features (see Section 3: Video Conference Platforms and Functions). These features can increase collaboration and approximate the dynamics of in-person events but must be used strategically. Practice all features before the meeting and only use those that you can use comfortably and explain clearly. Keep in mind that these features do not need to be used in every meeting and, when used unnecessarily, can detract from your event goals.

Use recording thoughtfully: Recordings allow the meeting planner to revisit content for notes, and some platforms provide a transcript. With these features, leads can be more fully present, and a note taker may not be needed. If you opt to record the session, be transparent with participants. Let them know that you will be recording before you begin and allow them to opt out of the recorded session. Recording may impede participants’ desire to discuss sensitive and/or controversial topics. For these situations, utilize a note taker instead of recording, stressing that all notes will be anonymous, and information shared will be confidential.

Consider participant engagement: How participants connect and engage is different in a virtual setting.

- In general, participants have an approximately 10 minute [“virtual” attention span](#). Plan your agenda to re-engage with participants every 10 minutes through polls, chat, new activities, and/or breaks
- It is can also be more difficult for participants to connect and engage with one another on a virtual platform. [Purposeful icebreakers and team building](#) can be used for building participant connection. It can also be helpful, to create participant profiles ahead of the meeting with each person’s name, short bio, and picture so that participants become familiar with whom they will be working with in advance.
- Use participants’ names to create rapport, establish trust and communicate inclusion. If you have more than one person with the same name, distinguish them creatively, with their permission (e.g. Kim A. and Kim L., or Chicago Kim and Philadelphia Kim for a personal touch).

Use pre-work but be realistic: Virtual events are typically shorter than in-person events due to virtual attention spans. Pre-work is a great tool to make sure the limited “face time” you have with your participants is collaborative. However, you cannot assume that everyone will do the pre-work. Clearly communicate that the pre-work is a requirement if you need all participants to complete it. Aim for one to two targeted items, as participants are unlikely to complete anything more. At the beginning of the event, include a brief recap of the pre-work concepts to ensure everyone has the same foundation for your time together.

Plan strategic breaks: Breaks are a vital part of virtual meetings in order to maintain participant engagement, and they are an invaluable tool for the facilitator. For longer events, make sure to include at least a five-minute break for every 60 to 90 minutes. Consider the following strategic uses for breaks:

- Allow everyone to address personal needs, such as stretching or grabbing a cup of coffee
- Reset participant's virtual attention span
- Provide a platform to generate small talk conversation through chat or verbal prompts
- Give participants reflection time to do an individual activity before sharing back with the group
- Allow introverted participants to reenergize through reflection and quiet time
- Grant the facilitator and/or note taker time to discuss next steps, adjust the agenda, or gather and synthesize feedback for activities (ex. conduct a poll, discuss ideas through chat, etc. and populate to a live document or white board for collective brainstorming)
- Breaks offer the facilitator and notetaker to talk offline momentarily to discuss next steps or make any agenda adjustments

Section 3: Video Conference Platform and Functions

Video Conference Platforms

There are many different video conferencing platforms available. Below is a list of five of the most common video conferencing platforms along with several of the key features.

Platform	Cost	Whiteboard	Chat	Breakout rooms	Polling	Q&A
Adobe Connect	Paid	X	X	X	X	X
GoToMeeting	Free & paid versions		X	X	X	X
Teams	Free & paid versions		X			
WebEx	Free & paid versions	X	X	X	X	X
Zoom	Free & paid versions	X	X	X	X	X

Common Platform Features

Platform Feature	Description
Breakout rooms	Allows host to divide the into smaller sessions of 2+ people. Many platforms allow you to either pre-assign or auto-assign participants into groups.
Chat function	Allows participants to send messages to each other or the hosts. The chat function can be a great tool to encourage participants to engage with one another and discuss ideas throughout the meeting, however; too heavy a reliance on the chat function can lead to limited verbal discussion. Designate an individual to monitor the chat and transition important conversations from the chat to verbal discussion.
Co-Host	Allows one or more other individuals, separate from the facilitator, to have background control of the event.
Polling	Allows hosts to create single-choice or multiple-choice questions for participants. Polling questions can be set up before or during the event.
Question & answer	Allows participants ask questions directly to the event organizers throughout the event. Able to designate panelists or other hosts to help answer questions. Can answer questions in real-time or at the end of the event.
Reactions	Allows participants to communicate or provide feedback without interrupting the flow of the event through silent reactions such as thumps up, thumps down, or even smiley faces and emojis.
Share screen	A basic function of most platforms, this allows the host, contributor, or participants to share a specific document or their screen allowing all participants see the same content at once. In most platforms, the host does have the ability to limit who has screen sharing ability.
Video	Allows participants to see each other. Often feature a “grid” view with thumbnails of each participant and a “speaker” view that displays a large

	<p>image of the person speaking. Video is strongly encouraged for virtual platforms. Do not enable automatic video, instead instruct participants in to turn on their cameras at the beginning of the event, this allows participants time to feel “camera ready.”</p>
<p>Whiteboard and annotate</p>	<p>Both that allow participants to directly interact with content on the screen by adding sticky notes, comments, and other visual elements. The primary difference between annotate and white board is that annotate allows participants to mark-up directly on a document that the host shares via the screenshare function, while whiteboard is a black workspace built directly into the video conferencing platform.</p>
<p>Other Integrated Platforms</p>	<p>There are many platforms that support virtual collaborations and can be integrated with a webinar software such as Zoom and WebEx. For example, Mural, a visual collaboration tool, creates a virtual sticky wall, allowing for activities such as the consensus method workshop and environmental scanning remotely. Collaborative documents, web-based and allow multiple participants to view and live edit the document at once such as Google Docs and SharePoint, can be used similarly to the whiteboard and annotate features.</p>

Section 4: Virtual Activities: Considerations and Techniques

One of the frequently cited challenges in moving in-person collaborative activities into a virtual environment is replicating the interactive features. All platform features are described in Section 3: Video Conference Platforms and Functions.

Virtual activities: Considerations & Common Techniques

Technique	Useful For	Considerations
Breakout rooms	Working in pairs or small groups to discuss or develop an idea. Or addressing multiple goals in one meeting.	<ul style="list-style-type: none"> • Allows in-depth discussion • May allow space for quieter participants to share insight • Can help alleviate issues created by dominant participants • Depending on familiarity of group members with material, may require a designated lead or facilitator per breakout
Chat box	Participants sharing information without the need for in-depth discussion	<ul style="list-style-type: none"> • Allows a space for quieter participants to share • Useful technique for warm-up questions, and initial brainstorming Some participants may rely on the chat box
Document Collaboration	Directly brainstorm ideas in a shared space. Separate from the virtual platform, unlike a whiteboard.	<ul style="list-style-type: none"> • Useful when whiteboard is not available in your platform • Not all participants may have access to collaborative documents, like Google Docs or SharePoint due to organizational firewalls, etc. • Participants may be more familiar with collaborative document use than the whiteboard function • Allows participants access to document before and after the event for pre or follow-up work • Participants can directly share ideas fostering direct engagement • Less functionality in terms of stickies, etc. to help with visualization • Too many collaborators at once can generate confusion
Individual exercise	Individually brainstorming before sharing with the group	<ul style="list-style-type: none"> • Participants can use pens and paper, allowing for a more organic experience • Allows participants advanced time to think and reflect • May appeal to internal processors If exercise is visual, the process of sharing via phone images/scans/etc. may feel a bit cumbersome • May be difficult for those that prefer external processing

Live Note Taking	Capturing participant discussion in real-time.	<ul style="list-style-type: none"> • Does not require participant technology mastery • Allows participants to visually see ideas as they are generated • Less direct participant engagement • Requires note taker comfort with technology platform
Pre-Work	Gathering participant input in advance of the event. Or preparing participants with the same foundation of knowledge.	<ul style="list-style-type: none"> • Allows facilitator to prepare and synthesize materials ahead of time • Takes less time during the meeting itself • Allows participants advanced time to think and reflect • May appeal to internal processors • Not everyone may complete the prework • Relies on participants having baseline knowledge to complete activity
Polling	Quickly gathering feedback from participants on pre-designed questions. Or as an initial ice breaker or discussion prompt.	<ul style="list-style-type: none"> • Most platforms require questions to be programmed ahead of time • Some platforms save participant responses, so may not be anonymous • Share results in real-time
Share screen	Allowing participants see the same information at the same time	<ul style="list-style-type: none"> • Allows facilitator to highlight specific information and facilitate group discussion • Presentations of information in a virtual setting can be challenging for participants, so be sure to consider adapting content for a virtual setting
Whiteboard	Directly brainstorm ideas in a shared space.	<ul style="list-style-type: none"> • Relies on participant use/mastery of built in technology features, such as adding sticky notes, text, etc. Making it important to provide instructions in technology use and have support person, other than facilitator, to help participants experiencing technology issues • Participants can directly share ideas fostering direct engagement • Most platforms have colors, shapes and the ability to add images to assist with visualization • Too many collaborators at once can generate confusion

Virtual activities: Adaptations for Common Activities

Activity	Virtual Adaptations
<p>Brainstorming Method for developing creative solutions to problems. A team activity in which participants think freely and suggest as many spontaneous new ideas as possible.</p>	<p>It is important when conducting brainstorming in a virtual setting to:</p> <ul style="list-style-type: none"> • Build in time for participants to reflect individually before large group discussion • Consider techniques (Section 1: Principles of Good Facilitation) that give all participants an opportunity to share • Consider information or prompts to share beforehand so that participants can arrive prepared <p><u>Sticky Storm Technique:</u></p> <ul style="list-style-type: none"> • Whiteboard: Use the sticky note feature and instruct one participant at a time to add an idea to the white board. <ul style="list-style-type: none"> - Platform features: Whiteboard • Document collaboration: Create a shared document such as Google Docs or SharePoint that allows each participant to add their ideas one at a time. <ul style="list-style-type: none"> - Platform features: Shared screen, collaborative document • Live note taking: A neutral notetaker, other than the facilitator, takes notes in real time using the white board feature or shared screen with PowerPoint or Word as each participant shares their idea. <ul style="list-style-type: none"> - Platform features: Shared Screen or white board <p><u>Affinity Diagraming:</u></p> <ul style="list-style-type: none"> • Whiteboard or shared screen: Use the sticky storm or other brainstorming technique to generate ideas, then have a note taker move sticky notes into groups as participants discuss. <ul style="list-style-type: none"> - Platform features: White board or shared screen • Pre-work: Ask participants to share their brainstormed ideas in advance of the event. In advance of the meeting, create an affinity map in a document or white board by grouping together similar ideas. Present this draft affinity map to participants and facilitate conversation. Do participants agree with the grouping? Are any ideas grouped incorrectly? Could items be grouped further? A neutral notetaker, separate from the facilitator, can take notes in the pre-prepared document. <ul style="list-style-type: none"> - Platform features: Shared screen and prepared documents <p><u>Mind Mapping:</u></p> <ul style="list-style-type: none"> • Whiteboard: Placing a topic or word into the center of a screen, participants can brainstorm sub-themes and subsequent branches collaboratively by using the platform's shapes, lines and colored text. In addition, participants can

	<p>search for images and place them in the mind map (provide guidance on image sizes).</p> <ul style="list-style-type: none"> - Platform features: Whiteboard • Individual exercise: Provide a template and the main topic or word, and direct participants to have their own colored pens and paper nearby to create their own mind maps. This technique is meant to mimic the natural, and sometimes haphazard, way that we generate ideas. Participants share their maps by sending a picture to the organizer for sharing, or uploading it themselves to a shared document or whiteboard. Alternatively, participants can share their sub themes and sub-branches verbally. - Platform features: Shared document or white board
<p>SWOT analysis SWOT or Strengths, Weaknesses, Opportunities, and Threats analysis provides an assessment of the internal and external factors that may help or harm a project.</p>	<p>SWOT analyses are typically conducted using in-person brainstorming and discussion. This template can be used for the following virtual adaptations:</p> <ul style="list-style-type: none"> • Whiteboard or collaborative document: The facilitator sets up a SWOT grid using the whiteboard function or a live collaborative document. Following facilitated discussion, each participant populates their ideas into the SWOT grid. If there is not enough room for all four quadrants within the whiteboard or collaborative document, they can be done one at a time. <ul style="list-style-type: none"> - Platform features: White board or collaborative document • Pre-work: Instead of conducting a full SWOT activity during the meeting, items for each quadrant can be solicited from participants beforehand. The facilitator compiles them and shares them out for discussion during the meeting. <ul style="list-style-type: none"> - Platform features: Share screen • Live note taking: Use screen share to show a pre-prepared document with question prompts for each of the four quadrants of the SWOT grid. Facilitator leads discussion for each question, while a note taker captures discussion live in the shared template. <ul style="list-style-type: none"> - Platform features: Share screen
<p>Prioritization The process of using agreed upon criteria or standards to evaluate a list of options and select specific items from that list.</p>	<p>It is important when conducting prioritization in a virtual setting that all participants understand the following before beginning:</p> <ul style="list-style-type: none"> - Relevant background or data - Goal of the prioritization - Criteria for prioritization <p>For general prioritization information, such as common criteria, visit NACCHO Guide to Prioritization Techniques.</p>

Strategy Grid: (Template available in link)

- **Annotate or collaborative document:** Create a template of the strategy grid of your event. Share it with participants using annotate or a collaborative document. The facilitator then instructs participants on populating each of the four strategy grid quadrants.
 - Platform features: Whiteboard or collaborative document
- **Live note taking:** Create a word document with the strategy grid in advance of the meeting. As the facilitator leads discussion of the criteria, and where items fall within the strategy grid, a designated note taker takes notes live within the strategy grid.
 - Platform features: Share screen
- **Pre-work:** Have participants complete individual strategy grids in advance of the event. The facilitator combines these into one strategy grid that can be discussed on the call. This pre-populated strategy grid can then be shared and discussed using either method described above.
 - Platform features: Varies
- **Nominal Group Technique:** As a technique that combines brainstorming and voting, reference “Brainstorming” for ideas on conducting the brainstorming component. The prioritization and voting component of nominal group technique can be completed using any of the voting strategies described below.
- **Multivote:** As a series of discussion and voting, a multivote technique can be conducted virtually using any of the voting strategies described below.

Simple Voting Techniques Using Platform Features:

- **Dot vote using whiteboard or collaborative document:** List or represent the items for vote in a document that can be shared via whiteboard or collaborative document. Instruct participants to annotate (using tallies, stickers, etc.) their top choices within the document. This technique can allow for anonymity and multiple votes.
 - Platform features: White board or collaborative document
- **Poll function:** Preset a poll with the items for prioritization. Ask participants to complete the poll. Responses will be shared directly in the virtual platform. This can be useful for quickly assessing top choices from the group, as well as narrowing a large list for further discussion.
 - Platform features: Polling

	<ul style="list-style-type: none"> • Thumbs-up/down: Participants can quickly react to specific questions. This is most useful for running simple majority yes/no votes, or gauging participants’ support of an idea. <ul style="list-style-type: none"> - Platform function: Reactions • Video Voting: Using the video grid function, instruct participants to turn off their video if they are not in support of an item. Individuals who then leave their video on can discuss why they support an item. The individuals who turned off their video turn their video back on and discuss why they did not support an item. This can be repeated until the group feels ready to take a vote. The same video grid can be used for this final vote, or one of the other voting techniques described above. <ul style="list-style-type: none"> - Platform functions: Video grid • Polling: If you know the categories you will be voting you in advance, you can set up a poll. You can set the poll to allow participants to choose one or multiple answers. <ul style="list-style-type: none"> - Platform functions: Polling
<p>Goal Setting</p> <p>Goal setting is frequently a precursor to action planning. Goal setting consists of reviewing data related to a problem or project, brainstorming, and prioritizing actionable goals.</p>	<p>Goal setting requires moving a group through a series of steps to agree on one or more actionable goals. First, participants must have a common understanding of the information and data related to the goals you are trying to set. Then, participants brainstorm related goals from that information and data. Finally, participants prioritize the brainstormed list of goals.</p> <p>This section will specifically describe considerations for the first step in this process, reviewing data related to goal setting. For techniques related to brainstorming and/or prioritization, see “Brainstorming” and “Prioritization” within this table.</p> <p><u>Data Walk:</u> Prepare data walk slides or visuals in advance. Use breakout rooms and guided questions to have small groups discuss data as presented. Bring the group back together to share insights.</p> <ul style="list-style-type: none"> - Platform features: Breakout rooms <p>Pre-Work: Prepare a topic overview or storybook for participants to review ahead of the event. To help ensure that participants complete the review and create a sense of accountability, include a few review questions for them to respond to via email to the facilitator ahead of the meeting. At the beginning of goal setting, answer participants’ questions about the pre-work.</p> <ul style="list-style-type: none"> - Platform features: None <p>Brief Presentation: Present data using a presentation, Prezi, etc. on shared screen can also be an effective way of sharing information before goal setting</p> <ul style="list-style-type: none"> - Platform features: Shared screen

<p>Visioning</p> <p>A collaborative process in which a group of people come together to identify a broad goal for at the start of a project to focus energy and drive strategy.</p>	<p>Visioning requires creative thinking to identify long-term aims that define accomplishment of the mission. You may use a defined visioning strategy, such as Cover Story Activity, or you may pick your own prompt based on your group’s goals. As such, many of the virtual adaptations recommended for goal setting and brainstorming can be used for visioning, as well. In addition, consider:</p> <ul style="list-style-type: none"> • Pre-Work: Assign all participants a prompt, such as “What do we hope to accomplish in 5 years?” or, “What does a healthy, thriving Activeville look like?” Have them independently brainstorm these prompts. Participants can submit their visions and compile them into one vision for presentation and discussion to the group. Or, participants can bring their visions to the visioning session and individually share their vision with the group. <ul style="list-style-type: none"> - Platform features: None
<p>Consensus Building</p> <p>Technique that can be used to bring diverse groups of stakeholders together to engage in shared learning and decision making.</p>	<p>Consensus building may include components of brainstorming, goal setting and prioritization. For idea generation around a consensus question/topic, see “Brainstorming”, “Goal setting” within this table. For prioritization and voting techniques, see “Prioritization” within this table.</p>
<p>Action planning</p> <p>Helps to focus ideas and align concrete strategies and actions within order to achieve identified goals and objectives. Common components of an action plan include a list of actions, timeline, dedicated resources, and activities leads.</p>	<p>It is important when conducting action planning in a virtual setting to ensure all participants understand the goals, objectives, and available resources or parameters (such as time) that will inform the final action plan. Templates and additional action planning considerations and tools can be found in NACCHO’s “Action Planning for Adolescent Sexual Health: A Guide to Strengthening Community Partnerships and Taking Steps to Improve Adolescent Health and Well-Being.” While this document is focused on adolescent sexual health, the tools and content can be adapted for any content area.</p> <p>Action Plan template:</p> <ul style="list-style-type: none"> • Breakout rooms: If there are several goals or objectives, use breakout rooms to assign individual goals to groups. Using a template, each group discusses the strategies, timelines, and other elements before coming back together to review the action plan as a whole. Many platforms allow you to assign participants to specific goals or objectives according to interest and skills. • Live note taking: If the group is small, discussion of elements of the action plan can be done together. The process generally benefits from assigning a note taker, who can take notes live in the action plan template via screen share. <ul style="list-style-type: none"> - Platform Functions: Screen share • Whiteboard or collaborative document: For more flexibility, use the whiteboard function or a shared collaborative

	<p>document to brainstorm strategies and move them around to create a timeline. This method is especially useful for groups of participants from diverse organizations with different resources and roles. In this case, brainstorming up front allows participants to educate each other about the possibilities before diving into action planning.</p> <ul style="list-style-type: none"> - Platform features: Whiteboard or shared collaborative document
<p>Logic Model “A graphic depiction that presents the shared relationships among the resources, activities, outputs, and outcomes/impacts for your program. It depicts the relationship between your program’s activities and its intended effects, in an implicit ‘if-then’ relationship among the program elements.” CDC</p>	<p>Logic models are a useful tool in project planning. A basic template can be found here. Often completed collaboratively, they can be led virtually by:</p> <ul style="list-style-type: none"> • Annotate or collaborative document: Create a template of your logic model in Word or another program. Share it with your participants using either the annotate function or a collaborative document. Encourage participants to brainstorm items, moving from left to right in the logic model. <ul style="list-style-type: none"> - Platform features: Whiteboard or collaborative document • Live note taking: Have a separate note taker take notes in a shared template as participants brainstorm items for each section of the logic model. <ul style="list-style-type: none"> - Platform features: Screen share
<p>Focus groups A focus group is a small group of people, brought together to explore specific questions around a problem. Focus groups consist of open-ended questions that yield discussion amongst group members that often yields deeper insight into the problem explored.</p>	<p>When conducting a focus group virtually, it is important to always:</p> <ul style="list-style-type: none"> • Consider the group composition to create a nonthreatening environment where members can share freely • Design questions thoughtfully to generate discussion • Consider if you need written consent from participants, and if so, how will you obtain it before the start of the focus group • Stress the importance of confidentiality - participants should not repeat conversations outside of the focus group • Ask participants if they are comfortable being recorded before beginning to record • Include more active listening, patience, pausing, summarizing, synthesizing, clarifying, and explicit communication to ensure shared meaning in communication <p>Key considerations for virtual focus groups:</p> <ul style="list-style-type: none"> • Video: Have the facilitator and participants use video to create a human connection and encourages deeper discussion. Being able to see each other helps maintain civility through controversial topics. Communicate to participants in advance that you will use video. Use a round-robin format to include participants who only join with audio to ensure everyone has the opportunity to share. <ul style="list-style-type: none"> - Platform features: Video • Chat function: Use the chat function to introduce warm-up questions. Specific chat-only questions allow all participants an

	<p>opportunity to warm up to group participation. Have a second person (who is not facilitating) monitor the chat.</p> <ul style="list-style-type: none">- Platform features: Chat• Share screen: Display specific documents and visuals for the group to react to. Use the annotate or white board function to allow participants to directly mark-up the materials, then facilitate further discussion about their mark-up and comments.<ul style="list-style-type: none">- Platform features: Share screen, annotate or white board• Consider Asynchronous Engagement: As an alternative to live sessions, create a bulletin board style focus group, in which participants return to the session periodically to answer questions and react to each other's comments. Live virtual focus groups present access issues for some participants (e.g. technology, time, or equipment). Asynchronous engagement requires fewer resources, allows participants to respond in their own time, and can offer anonymity between participants. This method is not recommended for controversial topics.<ul style="list-style-type: none">- Platform features: None
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Section 5: Close out

Just as within-person meetings, timely follow-up to virtual meetings is very important. [Effective closings](#) connect participants with what new knowledge they have gained.

- Allow time at the end of the meeting for participants to reflect on what you accomplished. Using a guided activity such, as the [rose, thorns, bud](#), approach, allows participants to reflect on highs and lows.
- Send meeting notes out as soon as possible. Make sure the notes include a list of all attendees to remind people of who was there. Attach all material, link to the recording meeting (if applicable) and associated resources shared on the call for attendees to review. Be sure to provide a clear list of action items and the due date and person(s) responsible.
- Conduct a meeting evaluation at the end of the meeting on what worked and what did not work. Seek specific feedback on ways to improve the virtual experience from both the standpoint of technology and processes.
- Build ideas for people to continue to connect outside the meeting/platform. [Remote team building activities](#), such as photo competitions or scavenger hunts can be a great way to keep up engagement.

We hope that this guide will be useful to you and your team and help you get the most out of your upcoming virtual events. Please note this guide is meant to offer some suggestions and potentials ideas and templates for use. Not all resources have been specifically used by NACCHO staff or members and our listing of the resource does not signify an endorsement of the organization or individual who created them or wrote the article.

If you have any questions, or would like to share other ideas that you've used, please send to pi@naccho.org.

Section 6: Resource List

Resources have been categorized by topic area.

General Facilitation		
Course: Crash Course on Virtual Facilitation	Technology of Participation	View the calendar to register for the course here: https://www.top-network.org/
Course: Virtual Facilitation Bootcamp	Technology of Participation	View the calendar to register for the course here: https://www.top-network.org/
Emergenetics: Tap into the New Science of Success	Emergenetics	https://nacchohq-my.sharepoint.com/:b:/g/personal/swellerpegna_naccho_org/EbVNNUuEyyxPs_Qzjplq3TkBOY6vCi142t09TLYlYxmgw?e=L5pk6A
Focused Conversation	Technology of Participation	https://www.top-network.org/use-focused-conversation
How to Conduct Effective Virtual Meetings	Clear Impact	https://clearimpact.com/resources/videos/how-to-conduct-effective-virtual-meetings/
Influencing Across Distance: 3 Strategies for Success	IDEO U	https://www.ideo.com/blogs/inspiration/influencing-across-distance-3-strategies-for-impact?utm_medium=email&utm_source=mailchimp&utm_campaign=6.2-Suz-Remote-Collaboration-Tips-2020-Mar&goal=0_f703b39d99-29a2da0c82-218615997
Online Learning Designing for Engagement and Collaboration	IDEO U	https://www.ideo.com/blogs/inspiration/online-learning-designing-for-engagement-and-collaboration?utm_medium=email&utm_source=mailchimp&utm_campaign=6.2-april-newsletter-2020-apr&goal=0_f703b39d99-f5340f8477-218615997
Section 2. Developing Facilitation Skills	Community Tool Box	https://ctb.ku.edu/en/table-of-contents/leadership/group-facilitation/facilitation-skills/main
The Basics of Designing & Facilitating Meetings	Massachusetts Institute of Technology Human Resources	https://hr.mit.edu/learning-topics/meetings/articles/basics
Working Together in One Space from Many Places	ToP Network	https://www.top-network.org/working-together-from-many-places
Planning a Virtual Event		
How and Why to Use a Meeting Agenda	Massachusetts Institute of Technology Human Resources	https://hr.mit.edu/learning-topics/meetings/articles/agendas

Virtual Meeting Agenda	Learning Rebels, LLC	https://mcusercontent.com/219b8e7f3ad60370897f9e358/files/4206f92f-8460-48d8-9b1b-49d66abb56fe/Sample_Virtual_Meeting_Agenda.pdf?utm_source=Learning+Rebels&utm_campaign=45aaab2f31-521412561-EMAIL_CAMPAIGN_2020_03_26_03_50&utm_medium=email&utm_term=0_23dca370f1-45aaab2f31-521412561
Virtual Meeting Bingo	Learning Rebels, LLC	https://mcusercontent.com/219b8e7f3ad60370897f9e358/images/9120b4d1-b4e6-4c2d-8353-d95e7c9ca925.jpg?utm_source=Learning+Rebels&utm_campaign=45aaab2f31-521412561-EMAIL_CAMPAIGN_2020_03_26_03_50&utm_medium=email&utm_term=0_23dca370f1-45aaab2f31-521412561
Virtual Meeting Checklist	Learning Rebels, LLC	https://mcusercontent.com/219b8e7f3ad60370897f9e358/files/f46c6337-07f3-40f2-b0f7-85b26919a934/virtual_meeting_Checklist_pdf.pdf?utm_source=Learning+Rebels&utm_campaign=45aaab2f31-521412561-EMAIL_CAMPAIGN_2020_03_26_03_50&utm_medium=email&utm_term=0_23dca370f1-45aaab2f31-521412561
Team Building		
Applications and Tools for Creating and Sustaining Healthy Teams	Public Health Foundation	http://www.phf.org/resourcestools/Documents/Applications_and_Tools_for_Creating_and_Sustaining_Healthy_Teams.pdf
Power Dynamics: The Hidden Element to Effective Meetings	Interaction Institute for Social Change	https://interactioninstitute.org/power-dynamics-the-hidden-element-to-effective-meetings/
The Best Virtual Team Building Activities, according to Real Remote Workers	Atlassian	https://www.atlassian.com/blog/teamwork/virtual-team-building-activities-remote-teams
4 Things to Know About Group Dynamics in the Workplace	Maryville University	https://online.maryville.edu/blog/4-things-to-know-about-group-dynamics-in-the-workplace/
15 Best Team Building Activities & Games for Remote Workers	Miro	https://miro.com/guides/remote-work/team-building

Virtual Icebreakers		
Creative Icebreakers, Introductions, and Hellos for Teachers, Trainers, and Facilitators	Business Training Works	http://www.fngovernance.org/resources_docs/Creative_Icebreakers_For_Facilitators.pdf
Virtual Icebreakers and Team Building Activities	Trainers Warehouse	http://blog.trainerswarehouse.com/virtual-icebreakers
Virtual Icebreakers and Connection Activities	Training Wheels	https://training-wheels.com/virtual-icebreakers-and-connection-activities/
Learning Styles		
What Does Malcolm Knowles Know About Adult Learning Theory?	iSPRING	https://www.ispringsolutions.com/blog/what-does-malcolm-knowles-know-about-adult-learning-theory
Technology		
Best Practices for Participants	Tufts University	https://it.tufts.edu/guides/audio-and-virtual-conferencing-zoom/best-practices-participants
How to Pull Off a Professional Video Call From Home	The Wirecutter	https://thewirecutter.com/blog/professional-video-call-from-home/
Join Meeting Test	Zoom	https://zoom.us/test
Brainstorming		
Brainstorming	American Society for Quality	https://asq.org/quality-resources/brainstorming
Mind Mapping	The Public Health Foundation	http://www.phf.org/resourcestools/Documents/Mind_Mapping_Tool.pdf
What is an Affinity Diagram?	American Society for Quality	https://asq.org/quality-resources/affinity
SWOT Analysis		
SWOT Analysis	Minnesota Department of Health	https://www.health.state.mn.us/communities/practice/resources/phqitoolbox/swot.html
SWOT Worksheet	NACCHO	https://nacchohq-my.sharepoint.com/:w:/g/personal/swellerpegna_naccho_org/EW3kJeE_QCpCrqOFKUCqk9UBjNY29pilPA-UDiN4I30TaQ?e=bO7ACa
Prioritization		
Dot Voting: A Simple Decision-Making and Prioritizing Technique in UX	Nielsen Norman Group	https://www.nngroup.com/articles/dot-voting/

Guide to Prioritization Techniques	NACCHO Quality Improvement Roadmap	http://qiroadmap.org/download/guide-to-prioritization-techniques/
Multivote	NACCHO	http://qiroadmap.org/download/guide-to-prioritization-techniques/
Strategy Guide	NACCHO	http://qiroadmap.org/download/guide-to-prioritization-techniques/
What is Nominal Group Technique?	American Society of Quality	https://asq.org/quality-resources/nominal-group-technique
Goal Setting		
Data Walks: An Innovative Way to Share Data with Communities.	Urban Institute	https://www.urban.org/sites/default/files/publication/72906/2000510-Data-Walks-An-Innovative-Way-to-Share-Data-with-Communities.pdf
Visioning		
Cover Story: A Fun Shared Vision Exercise	Idealist on Campus	https://www.bhopal.net/old_studentsforbhopal_org/Assets/Cover-Story_Visioning_handout%5B1%5D.pdf
The Secrets to Facilitating Strategy – The Visioning Exercise	Leadership Strategies	https://www.leadstrat.com/leadership-strategy-resources/facilitating-strategy-visioning-exercise/
Consensus Building		
Consensus Decision Making	Seeds for Change	https://www.seedsforchange.org.uk/shortconsensus
Action Planning		
Action Planning for Adolescent Sexual Health: A Guide to Strengthening Community Partnerships and Taking Steps to Improve Adolescent Health and Well-Being	NACCHO	https://eweb.naccho.org/eweb/DynamicPage.aspx?WebCode=proddetailadd&ivd_prc_prd_key=8b5689df-c865-4bbf-b4db-12ef2641879d&Action=Add&site=naccho&ObjectKeyFrom=1A83491A-9853-4C87-86A4-F7D95601C2E2&DoNotSave=yes&ParentObject=CentralizedOrderEntry&ParentDataObject=Invoice%20Detail
Logic Model		
Basic Logic Model Template	Health and Human Services	https://www.hhs.gov/ash/oah/sites/default/files/logic-model-template-worksheet3_0.pdf
Program Evaluation Framework Checklist for Step 2	Centers for Disease Control and Prevention	https://www.cdc.gov/eval/steps/step2/index.htm
Focus Groups		
Chapter 10 Online Focus Groups	University of Alaska Anchorage	http://www.cbpp.uaa.alaska.edu/afef/chapter-10_online_focus_groups.htm

Section 6. Conducting Focus Groups	Community Tool Box	https://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources/conduct-focus-groups/main
Close Out		
Closing Ideas: facilitating tips, tools and techniques	The University of Maine	https://www.uvm.edu/sites/default/files/closing-ideas.pdf
Rose-Bud-Thorn for processing and reflection	Trainer Warehouse	http://blog.trainerswarehouse.com/rose-bud-thorn-processing-reflection