

**How to Effectively Facilitate a Public Health Virtual Meeting:
A Comprehensive Guide**
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Written Exclusively for Leading Public Health

I love Zoom: my type-A heart loves the neat little participant squares, the digital “raise hand” feature that creates chronological lists of who gets to speak when, and the ability to drop resources and comments into a chat box for a more engaged experience. As a trainer and facilitator I thought for sure I’d slowly grow to loathe Zoom (like many of my colleagues), but now I’m convinced that there are certain meetings and workshops that *work better* on a virtual platform.

However, a virtual meeting only works better than an in-person function if you put a fair amount of thought and planning into it. What follows is a pretty comprehensive guide (as in, this is a pretty long post for a blog) to show you how to get the most out of a virtual facilitation experience.

Last week I had the privilege of facilitating a large exploratory meeting between the CDC and several national mental health organizations to begin addressing the challenges adolescents have experienced as a result of COVID. This event had all the hallmarks of a potentially disastrous meeting: a large attendee list (over 60 people), a massive agenda with lofty goals, and several participants from various organizations who may or may not have ever spoken or worked together before. Despite the challenges, the meeting went more than smoothly – we actually had a pretty good time!

Which is why I want to share with you exactly what we did to get that outcome so you can walk away from the meetings you facilitate knowing you brought out the best in the participants.

1. Identify the specific outcomes you want to achieve before planning anything else

Whenever someone asks famous Broadway composer Stephen Sondheim for writing tips, one of the first pieces of advice he offers is “content dictates form.” This guidance transcends musicals; making sure your content dictates the form of your speech, meeting, lesson, blog, etc. dramatically increases the chance your work will connect with the audience and add real value. For example, a blog post’s content is often meant to teach a simple process or concept, therefore its form is often a listicle the reader can easily skim to get the key points and return to later for more elaboration.

For a facilitated meeting, establish the content early by asking: “What is the one specific thing we want to accomplish with this meeting?” The answer to this content question guides everything from how long the meeting should be, to who gets a speaking role, to how the agenda is crafted. Every part of the meeting should be aimed at achieving this

goal and anything extraneous gets stripped out. (No one, in the history of meetings, has ever complained about there not being enough extra fluff to waste their time!)

In the meeting addressing adolescent mental health, the purpose was to begin the dialogue between these various agencies and establish a few key action steps to get the ball rolling. This content meant that the form of the agenda was several open-ended critical thinking questions designed to establish what we already know about the issue, and what we still need to find out to formulate a viable plan.

We put the questions on both the agenda (which was shared ahead of time) and the slides so everyone would be able to read, think, and consider their answers ahead of time. This eliminated awkward silences, circular conversations, and kept everyone on task and not running after whatever new, shiny tangent showed up to distract them. The content of making sure everyone discussed these key questions dictated the form of how and when we presented them.

This also means that you, the facilitator, should have a key role in planning the meeting and developing the agenda to ensure the objectives of the meeting are being met.

2. Prepare for anything and everything to go wrong - so it doesn't

Being a successful facilitator demands that you maintain a delicate balance between planning ruthlessly and also being open to making changes on the fly if something isn't working. To do this successfully, consider all of the things that could go wrong - from technology breakdowns to out of control egos - and develop a mini-plan for each scenario you may or may not need to use.

For example, if you're on Zoom make sure you have a second person acting as Co-host so if you freeze up or get booted off they can seamlessly take over until you're up and running again. I had my tech partner equipped with hosting capabilities and a clear set of steps to follow just in case. We also kept an open line of communication via direct chat message in case she saw something of note that I may not have, but needed to be aware of. The end result is a meeting that ran smoothly and effectively.

Planning for the various possibilities also has an added bonus of reducing stress about managing all of the aspects of facilitating a successful meeting.

3. Summon your inner control enthusiast by setting clear ground rules and guidelines for participants – then follow them to the letter

Think back to when you were in school – were your favorite teachers the doormats who let the students run the room because they wanted to be liked or didn't know how to maintain order? Probably not. When I was teaching in the classroom, I learned students prefer a well-structured, orderly learning environment with clear and consistent

expectations. This is a fancy way of saying people like it when the rules are clear, fair, and uniformly enforced because it creates a feeling of safety and certainty.

When you are planning your virtual meeting, establish guidelines for everything that could impact the quality of the communication and how people feel about it. This is especially important when your group size exceeds 40 people.

Consider the following guidelines I implemented for the CDC/MHA meeting:

-We established that some participants would be speaking participants, while others would be “observation only” as the group was large (60+ people) and we needed to ensure key participants had ample opportunities to share. Observation-only participants kept cameras OFF so the speaking participants (with cameras ON) would be sorted to the top of the screen.

-I kept everyone on mute to prevent background noise and distractions; if they wanted to speak they had to raise a digital hand to speak, which allowed me to call on people in order. This meant everyone knew they would get their turn to speak without having to fight for it by cutting someone else off or worry about themselves getting interrupted.

-I also advised everyone to keep responses related to the specific question at hand and limited to roughly 90 seconds max. This kept the conversation moving forward and productive.

-Finally, I coached them on how to make the best use of the chat function. This allowed observation-only participants to ask clarifying questions of the speakers; everyone could offer agreement when they heard something they liked without taking speaking time away; and they could share resources easily that related to the current discussion. We were able to save the chat transcript and share it with participants so they had a lasting reference of what we covered.

However, all of these practices are meaningless unless you’re willing to consistently follow them and ensure the participants are following them as well. Stay connected to the core purpose of the meeting and reiterate it if need be so the value of the guidelines is clear.

4. Keep the spotlight on the participants and off of yourself

The biggest challenge virtual facilitators face isn’t fickle tech or longwinded speakers – it’s your own ego. This is especially true if your primary background is as a trainer or coach because you’re used to being the center of information in front of an audience. But being a successful facilitator means operating as the hidden hand who guides a productive conversation and NOT being the contributor of content.

It doesn’t matter if you have an extremely cool/interesting/valuable tidbit to share that’s related to the conversation at hand, this is not your role. I’ve seen too many trainers try to facilitate meetings and hijack the conversation because they just can’t help themselves. Remember that content dictates form, and if they invited in an external facilitator to guide the meeting, then the content doesn’t have room for you to add your two cents.

That said, there are a few key places you should be speaking:

-When opening and closing the meeting (a facilitator is to some extent the emcee of the meeting, but without the entertaining interludes).

-When calling on participants to speak and then thanking them when they're done. I also like to let everyone know who the next 2-3 speakers are as well, so the people waiting to contribute know they've been seen and will be heard.

-If there is something noteworthy in the chat or someone's question went unanswered, it's appropriate and effective to call attention to it (again, this is content dictating the form).

5. Have fun!

We have loads of studies showing that when people are happy, their cognitive function dramatically improves. Improved cognitive function amongst your participants means a better conversation, which leads to better outcomes for the meeting. As the facilitator your "stage time" may be limited, but you can help your participants feel good by warmly inviting people to speak and thanking them when they're done; using beautiful slides to keep everyone on track and visually engaged; and keeping everyone from feeling stressed or overwhelmed by being a steady, calm presence.

If all that isn't enough, then feel free to show everyone a cute pic of a kitty or puppy – I've seen some of the most accomplished professionals in the world relax and open up after looking at a pic of my adorable kitty, Poppy.

One last thought about having fun: be ever mindful of the orientation and values of your audience. In this case (and while not exclusively true about public health), relationality matters a great deal. Public health is a big-hearted practice full of people who wish to help others, therefore cultivating relationships is essential. Which was all the more reason to weave in small things that allowed people to be much more than a square on a screen.

A year ago, we all thought working virtually was going to be a temporary arrangement and we would all go back to in-person meetings within a few weeks. A year later it's clear that not only will we be working virtually much longer than anticipated, but there are some events that will now be exclusively virtual. Embrace it, lean into it, and become excellent at it in order to best serve your clients!