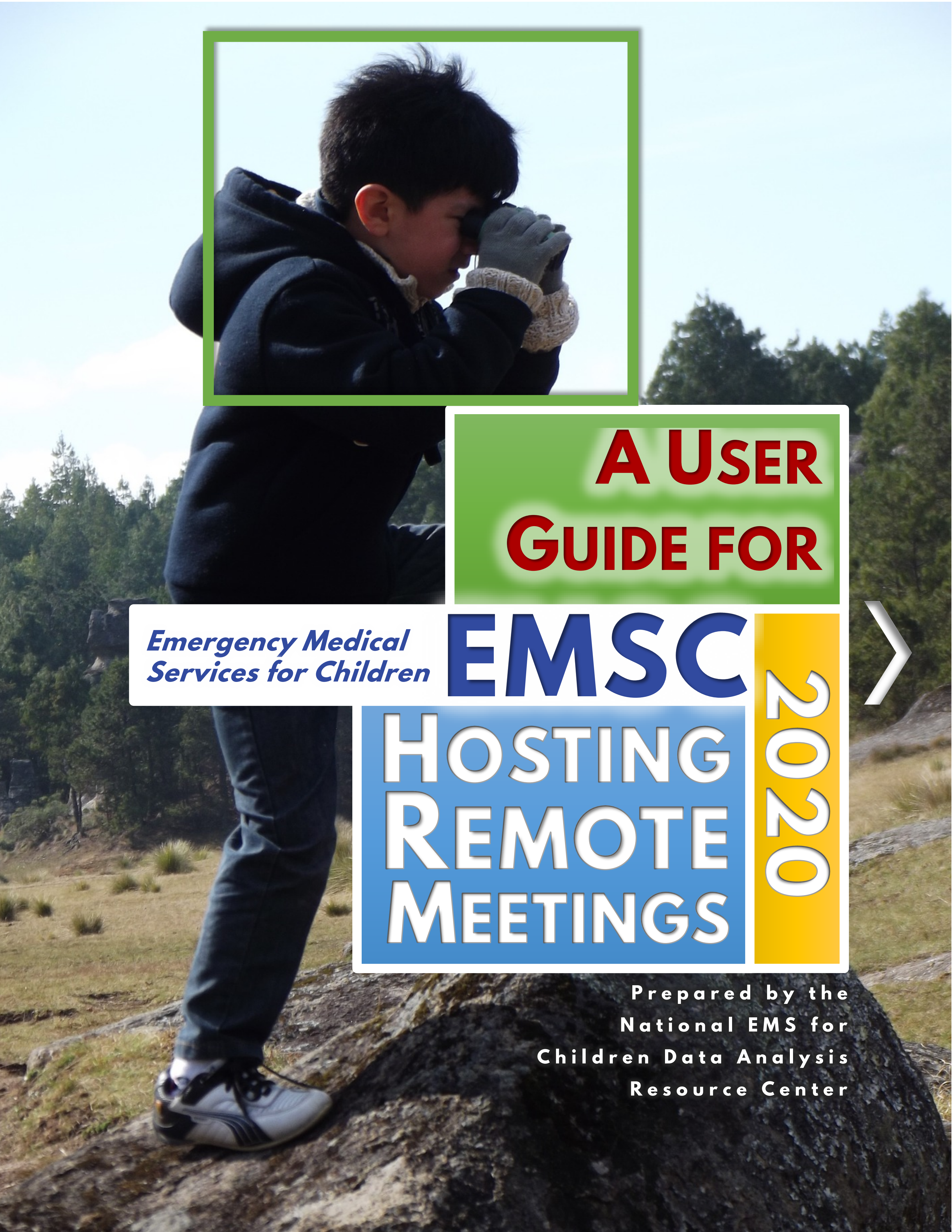


A User Guide for EMSC Hosting Remote Meetings 2020

Emergency Medical Services for Children

Prepared by the National EMS for Children Data Analysis Resource Center

This resource is supported by the Health Resources and Services Administration (HRSA) of the U.S. Department of Health and Human Services (HHS) as part of the Emergency Medical Services for Children Data Center award totaling $3,000,000 with 0% financed with non-governmental sources. The contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement, by HRSA, HHS, or the U.S. Government. For more information, please visit HRSA.gov.

Resource created by the National EMS for Children Data Analysis Resource Center (NEDARC) ©

This document was self-published June 2020

ACKNOWLEDGEMENT: We would like to acknowledge and thank the following individuals for their review and feedback that contributed to the completion of this document (*listed alphabetically by first name*):

- Erica Kane, MPH, CHES, CPST; Wisconsin EMS for Children Program Manager
- Rachel Ford, MPH; Oregon EMS for Children Program Manager
- Susan S. Gallagher, MPH; (ret) Director, MS Health Communication, Tufts University Medical School

NEDARC
The National EMSC Data Analysis Resource Center

University of Utah, Department of Pediatrics
295 Chipeta Way
PO Box 581289
Salt Lake City, UT 84158-1289
www.nedarc.org

Table of Contents

Note: Table of Contents page numbers are those noted on the bottom right corner in this guide.

To jump to a specific section listed in the Table of Contents, click on the section name.

In-Person and Remote Meeting Life Cycles

Remote meetings may not be a regular part of your everyday workflow, and how to make them efficient can be a bit of a challenge. When tasked with setting up a remote meeting some of the things you may be wondering are:[1]

- What's the best tool to use?
- How do I make sure the remote meeting is effective and productive?
- How do I run a remote meeting?

In many ways remote meetings are similar to in-person meetings; however with remote meetings, facilitating discussion and keeping participants engaged can be even more challenging.

This user guide is intended to help you plan and host **high quality** in-person and remote meetings. In the following pages we will take a look at what you need to know about running high quality meetings with external stakeholders and organizations. Keep in mind that every project and group is different, so not all listed guidelines can be adopted for your purposes. In other words, adapt and adopt whatever you think is helpful based on your specific situation.

Our goal is for every meeting (in-person and remote) to be of high quality. All high quality meetings consist of three main life cycles: 1) Before the Meeting, 2) During the Meeting, and 3) After the meeting (*see* *Appendix A: Remote Meeting Task Checklist*).[2, 3] Each meeting life cycle will be covered in more detail throughout this guide.

Life Cycle 1: Before the Meeting

Four primary tasks need to be accomplished during the Life Cycle 1. These tasks are working with conflicting schedules, building an agenda, preparing participants, and working on pre-meeting logistics.[2, 3] Meetings take a good deal of planning. A helpful rule of thumb is for every 1 hour or meeting, it will take 2 hours of preparation.[2]

Life Cycle 2: During the Meeting

During the remote meeting, there are several things you can do to make it a high quality meeting. One is to take roll call. Other things to do during the meeting include starting on time, explaining the objectives and desired outcomes of the meeting, verballing reviewing the agenda, reviewing meeting norms, and reviewing action items from the previous meeting.[2, 3]

Life Cycle 3: After the Meeting

There are four meeting follow-up stages to ensure a successful meeting and attaining action steps. The four meeting follow-up stages are at the end of the meeting, day after meeting, a week after the meeting, and one month after the meeting.[2]

To see a humorous example of a **low quality** *remote meeting, click on the image to the left to play a popular YouTube video. If that doesn't work, you can use this link:* https://www.youtube.com/watch?v=DYu_bGbZiiQ

Life Cycle 1: Before the Meeting

Choosing the Right Tools for the Job

> ***Audio and video capabilities are non-negotiable***

There is an abundance of technology out there that facilitates the process of running remote meetings. The key is figuring out which of these tools is right for your purposes. PC Mag reviews some of the top remote meeting tools.

When choosing remote meeting tools, you should answer these three questions before making a final decision to ensure getting the tool that will best meet your needs.[1]

1. What is the key functionality I need for this remote meeting to be successful?
2. How many people need to be involved in my remote meeting?
3. How can technology make my remote meeting more efficient?

The right tool depends on your needs. Basic functionality of any tool you decide on should include video and audio functionality.[1] For meetings involving external partners, you will also want to ensure participants have access to the tool. Further considerations for choosing a tool to host your remote meetings are whether you need to see one another (video conferencing). If your need is more along the lines of the participants needing to watch a presentation for demonstration, then you would want to use a screen-sharing tool. Many remote meeting tools can serve both of these functions.

The “right tool” depends on other factors too. For example, healthcare professionals sharing Protected Health Information (PHI) would need to use **HIPPA compliant** tools. Governmental organizations often have stringent administrative lockdown on applications. For example, many state Department of Health organizations have historically blocked Skype. **Check with your IT** before making any decisions about tools.

After functionality considerations, you will need to consider the size of the group that will be participating. The tools that you use in one-on-one virtual chats (like DM or IM) are not effective tools for hosting remote meetings with 20 or more remote participants. It’s best to make sure the remote meeting tool you choose can accommodate a large number of remote participants.

Once you have determined the basic functionality requirements and scalability of the tool, you need to consider efficiency. Whichever remote meeting tool you decide on, it should be used to simplify processes and make information more accessible. Thus, when you’re assessing these tools, assess whether it can do more than just meet your minimum needs. Assess whether the tool includes **recording capabilities** to allow you to share material with those not able to attend your live remote meeting(s).

Defining Logistics and Working with Conflicting Schedules

> *[Remote meetings] allow everyone to be where they need to be in their own context.*
>
> *-- Bryant Galiando, CollabsHQ*

LOGISTICS: Before sending out dates and times to participants, there are pre-meeting logistics to work out first. Remote meetings can consist of some or all of the participants joining the meeting remotely. The number of participants who will be in-person as opposed to remote determines the appropriate meeting room, which will need to be available for your proposed dates and times.[2]

Meeting room requirements include a room large enough for the estimated number of in-person participants. Other meeting room considerations for choosing an appropriate space for remote meetings are whether the room can be set up in an optimal layout, if the meeting space has the required audio visual (AV) equipment, and if the ideal room is available for the dates you are considering. Figure 1 on the following page is a decision tree to help walk you through the questions for determining if you have a meeting room that would work for a remote meeting. Meeting **room layout** is even more important for having an effective remote meeting. The layout types to **avoid** for meetings with remote participants include theater, banquet, and classroom. These three layouts hinder remote participants being heard and from hearing in-person participants.

Accessibility of AV equipment is an often overlooked logistic that is vital for having meetings with remote participants. The bare minimum required equipment for remote meetings is a Polycom/conferencing telephone, microphones for in-person participants, speakers so in-person participants can hear remote participants, a screen and projector or TV, and a LAN line wired internet connection.

SCHEDULING: Figuring out dates and times to get everyone involved in your remote meeting is a struggle, especially if you're working with remote participants across multiple time zones.[1] Even if you are conducting your remote meetings with domestic participants, there is a significant difference in time zones stretching from Maine and Caribbean US territories to the US territories in the Pacific Rim Region. The difference amplifies if you are also coordinating with international participants. Hence, it is imperative to find dates and times that work for everyone and to look for time frames that work for everyone's time zone.

There are plenty of free tools that help you to identify possible times of the day for your participants:

- Every Time Zone allows you to see what time it is across time zones
- The World Clock Meeting Planner from timeanddate.com allows you to input your participants' different locations and then creates a table of suggested meeting times
- Worldtimebuddy lets you add yours and your participants' locations and then creates a table showing what time it is in each place

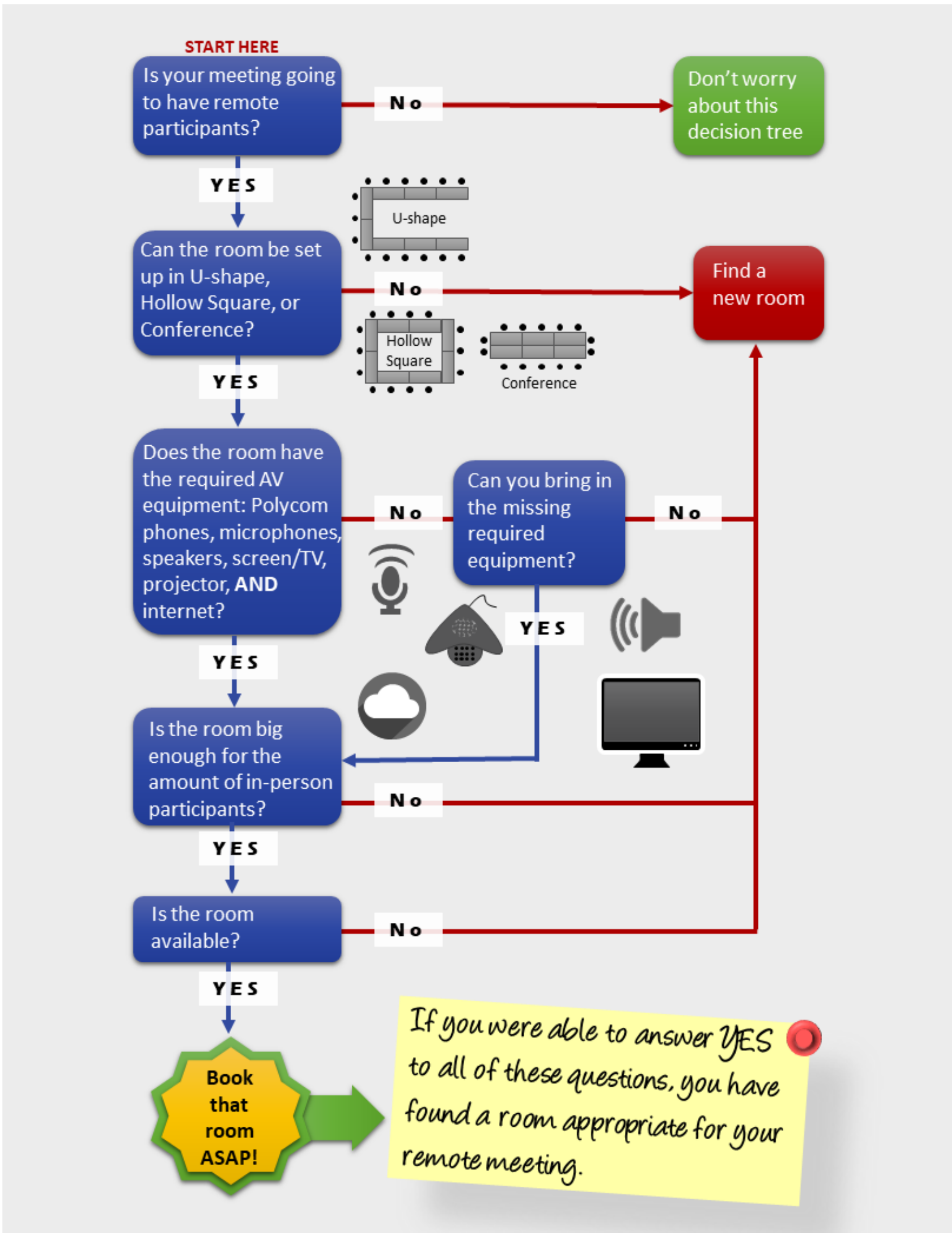
After identifying possible times, the next step is to list those times with possible dates where participants can indicate their availability. A free tool to send to participants to arrive at a date and time that works for all for most is Doodle. This tool is easy-to-use.

Pro Tip **The general preference is to set meetings in the early mornings because this will give participants the rest of the day to work on the action items while they are fresh.[4]**

Remember, it's best to schedule meetings months in advance (*see Appendix A: Remote Meeting Task Checklist*). The further out the date(s) for a meeting, the more likely participants will have availability. One of the best ways to facilitate future meeting planning is to set it at the end of a current meeting. Have participants bring their calendars to help schedule action item deadlines and the next meeting.[2, 3]

Once the dates and times are set, it's important to send calendar appointments to everyone who should be attending (*see Appendix A: Remote Meeting Task Checklist*). The calendar appointment should include the in-person and remote meeting participation information. In-person participation information includes the address, meeting room number, and driving and parking instructions. The remote meeting information in the calendar appointment needs to include the remote meeting link, conference number and participant ID number and/or password, how to log in (e.g., select Guest and enter first and last name), tool requirements (e.g., Zoom), and video and audio requirements.[4]

Figure 1: Remote Meeting Decision Tree for Choosing a Meeting Room



Setting an Agenda and Remote Meeting Guidelines

> *Failure to plan is Planning to Fail!*

PLANNING AGENDA: Planning your agenda is one of the **most important** tasks to making sure your remote meeting will be successful.[2, 3] If your agenda is not set before the meeting, you will waste valuable time during the meeting figuring out what you need or want to cover.[1] While many use meetings to share information, high quality meetings strategize how a group can move forward in a meaningful way.[5] For a peer-review published article on this subject, check out "Let's get this meeting started: Meeting lateness and actual meeting outcomes".[5]

Before even starting an agenda, you will want to determine if a meeting is actually needed.[5, 6] Every meeting should have a purpose. Ineffective meetings waste an estimated $37 billion a year.[6, 7] As part of deciding if a meeting is needed, you should define the objective and desired outcome. To help you define the meeting objectives complete this sentence "*The objective of this meeting is to….*"[4]

- "*make a decision on…*"
- "*generate ideas about…*"
- "*get status on…*"
- "*make plans for…*"

Hence, before planning begins it is important you decide if a meeting would be useful based on the objective.

Presentation Style Meetings: If your meeting would primarily consist of one individual talking to a group, this is more of a presentation. Meetings set up in this format make it hard for participants to pay attention to the content. To keep the participants engaged try emailing the slides before the meeting and devote the majority of the meeting to discuss the information.[5, 6]

Status Update Style Meetings: Another common style of meeting consists of simple quick project updates. There is a more effective and efficient way to use people's time. Instead of forcing people to interrupt their day for status update meetings, develop a way of posting updates in group messages (internal/external) or writing on a status board in the office (internal only). Follow-up discussions should only include the people involved in that particular project activity.[5, 6]

SETTING AGENDA: After determining the need for a meeting, the next step is to set an agenda and assign roles and duration (*see* Appendix B: Generic Agenda Template). The **#1** rule to having a high quality meeting—whether it's in-person or remote—is to set an agenda and to get feedback from participants in advance of the meeting (*see* Appendix A: Remote Meeting Task Checklist)![5, 6]

Do you routinely only get through 2 of 10 agenda items? Does everyone forget what their action item assignments are for the next meeting? It may be time to rethink your meeting strategy by being proactive with setting meeting agendas. The reasons setting an agenda and getting feedback before the meeting is important is because it

- Notifies participants of the meeting expectations through the listed objectives, outcomes and action/agenda topics
- Helps participants be prepared
- Helps table side discussions
- Generates buy-in from participants/stakeholders through their feedback

All meetings have three components: **Topics**, **Outcomes**, and **Processes**. Use these components to set your agenda. The topic is what you want to discuss. The outcome is the way you want the topic to turn out. And, the process is the facilitation method you will use to get to your topic outcome.[2, 3]

Example

- **Topic** → Budget carry-over
- **Outcome** → How we will spend the money
- **Process** → Brainstorm & vote

Your agenda should contain a time estimate and presenter for each topic and the process for arriving at the desired topic outcome.[1, 2] In addition, prepare a list of outstanding action items from previous meetings and add them to the first part of the agenda for responsible parties to report (*see Appendix B: Generic Agenda Template*).[2-4]

Those setting the agenda often make the mistake of not allowing for the appropriate amount of time to achieve the intended objectives and outcomes. For example, a strategic planning meeting with the objective of creating a strategic plan for a statewide program requires more than a 1-2 hour meeting and more than just one meeting. When planning and setting your agenda, the type of meeting you want to have will dictate the amount of time needed to accomplish your objectives and outcomes. Below is a table that will help you determine the ideal meeting length*.[6] These meeting types are not mutually exclusive and can be set in several combinations based on objectives and outcomes. For each type you combine with another you will need to also add the ideal meeting length: decision-making (several hours) + 1 brainstorming topic (1 hour) = amount of time to allot for your meeting.

Meeting Type	Ideal Meeting Length*
Regular Team/ Program Update	15 to 30 minutes
Decision-making	A few hours, possibly a full day depending on the decision
1-Topic Brainstorming Session	40 minutes to 1 hour (add 40+ minutes for each brainstorming topic)
One-on-one	30 minutes to 1 hour
Strategic Planning	8 hour initial meeting and subsequent 1 hour follow-up meetings
SWOT/SWOC Analysis	4 to 8 hours initial meeting and subsequent 1 hour follow-up meetings

** length listed is for a meeting of up to 10 people; more attendees → more ideal meeting length required*

FACILITATION: Often the person drafting the agenda will also serve as the meeting facilitator. If that person will not serve as the meeting facilitator, you should make sure to **designate a facilitator**. A designated facilitator will keep the meeting on-topic and running when discussions digress.

Facilitators will also ensure that your meeting starts on-time, to engage participants, and to assign roles. Most research indicates that the amount of time wasted in meetings is 30% - 60%. In addition to having an agenda and facilitator, engaging participants, and assigning roles are also important for running a high quality meeting.[2]

> *"SMART FACILITATORS ARE KEY TO SUCCESSFUL MEETINGS. THEY KEEP PEOPLE ON TRACK, ARE NOT AFRAID TO INTERRUPT, CALL OUT PARTICIPANTS FOR BEING OFF-TOPIC, AND SUMMARIZE THE TO-DOS AND NEXT STEPS."* - FARAH JAFFER, KAISER PERMANENTE

TIME-KEEPING AND NOTE-TAKING: Other roles you should consider assigning before the meeting are time-keeper and note-taker. The time-keeper helps the facilitator keep the meeting running and on schedule. The facilitator and time-keeper work together to hold participants accountable for their time limits and don't let them stray off-topic.[4] You can use the agenda as an alibi to ensure everyone remains on-topic.

! Pro Tip **When participants get off-topic you can say *"Because we have little time on the agenda and a few topics we must absolutely cover, let's please take this conversation off-line."*[4]**

For note-taking the important parts of the meeting to capture are the action items and decisions. Each action item should have a deadline and which participant(s) are responsible for its completion.[2-4] To reduce cognitive burden for the note-taker and for participants' review of the notes post meeting, include tables for both action items and decisions (*see Appendix B: Generic Agenda Template*)

Life Cycle 2: During the Meeting

Etiquette for Remote Meetings

> *Mute that phone and other must-dos for successful remote meetings.*

While meetings may have different norms specific to the organization or function, there are some basic etiquette practices for the meeting facilitators and another set participants should follow to create a high quality remote meeting experience.

FACILITATOR ETIQUETTE: Participants are **NOT** the only ones with a set of norms to follow. The facilitator should review the objective, process, and duration for each topic. Facilitators also need to make sure to conduct periodic check-ins with the group.[2, 3] Other basic etiquette facilitators should follow include: join the meeting early, starting the meeting on-time, introducing everyone during the meeting, turning off all notifications, and making sure your cell phone is on silent.[1, 4, 6] The best practice is to join your remote meeting early, anywhere from 5-30 minutes before the scheduled start.[4] Joining early allows you to check all of the technology you will be using is working and gives you the ability to troubleshoot issues (*see* *Appendix C: Technology Checklist*).[4] If a participant joins early, you can use that opportunity to ensure they can see what you want to share on the screen and that the audio is working. And the other reason for joining early ensures you are able to start the meeting at the scheduled time and you are role modeling expectations for your participants.[4]

> *"THE ANNOYANCE THAT GROWS WHILE WAITING FOR THE MEETING TO START SPILLS OVER INTO THE MEETING ITSELF, RESULTING IN MORE INTERRUPTIONS, FEWER IDEAS, AND DECREASED MORALE. CRUSH THAT CRANKINESS BY GETTING STARTED ON TIME, EVEN IF EVERYONE HASN'T ARRIVED."* - JENNIFER PHILIPS

As the facilitator, stay fast to starting the meeting on-time. The reasons to holding fast to this etiquette is to manage participant expectations. If you make a habit of waiting to start the meeting until everyone is present, it encourages participants to arrive late. If you start on schedule, participants who are habitually late will learn that the meeting will not wait on their arrival, and will make it a priority to not be tardy. Also, you want to honor the time of those participants who did arrive on time to the meeting. By starting the meeting as scheduled, you are honoring their time and managing all participants' expectations.[2, 3, 5-7]

Pro Tip **If anyone joins really late, avoid repeating information and carry on with your meeting.[4]**

PARTICIPANT ETIQUETTE: Welcoming and reviewing participant meeting norms are important ways to start the meeting to ensure you have a high quality meeting. An obvious norm most of us have experienced as participants during remote meetings is to mute our telephones. However, there is a list of other norms that will help improve your remote meetings. These norms include asking participants to:[2, 3]

- Be on time
- Mute telephones
- Be clear and concise
- Engage others with questions and offer your opinion
- Don't interrupt other people when they're speaking (or attempt to speak over them)
- Ask for clarification if needed
- Strive to stay focused; avoid doing other tasks (like checking email)
- Announce your name when presenting or commenting
- Does everyone need to have their camera on?

Keeping Participants Engaged

Make time for casual conversation!

Ever attended a meeting where no one says anything? Lack of engagement by participants is a characteristic of a low quality meeting. Creating engagement in remote meetings can be even more challenging. There are things you can do as the meeting facilitator to promote participant engagement to achieve a high quality meeting.[1]

The first thing you can do to increase engagement actually happens a few days before the meeting (*see Appendix A: Remote Meeting Task Checklist*). At that time, send out email reminders to participants. In the email you can give instructions to review the agenda and any materials you need them to review before they attend.

Pro Tip

An example would be to say something like *"To have a productive meeting, please make sure to review the agenda and attached materials before coming to the meeting."*[4]

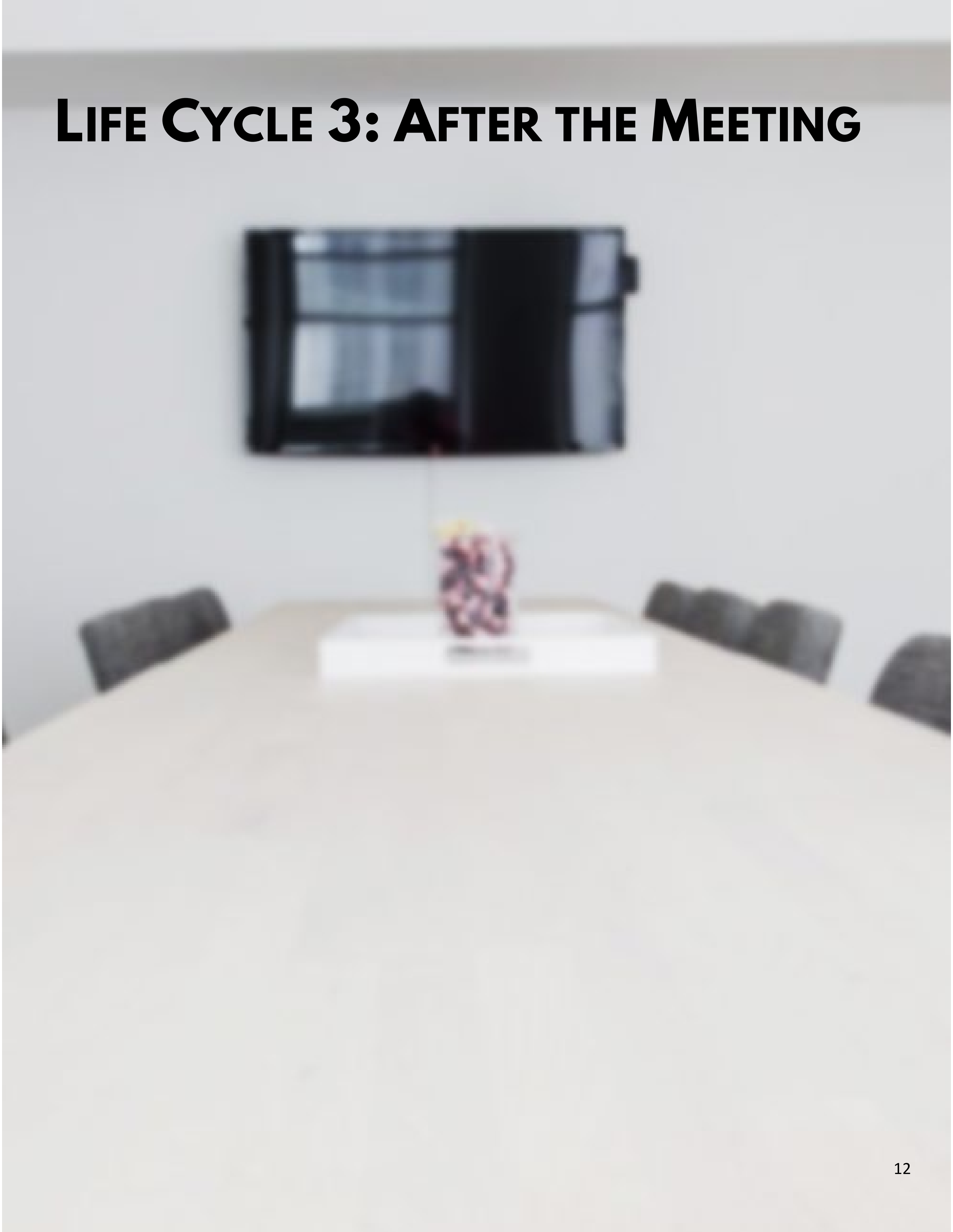
Another way to encourage engagement is to kick off your meeting with a FEW minutes of friendly casual conversation. In the Etiquette for Remote Meetings section of this guide, an important facilitator etiquette listed is to **start** the meeting **on time** – for the reasons, refer to the previous section. Starting your meeting with a bit of casual conversation accomplishes two objectives. It keeps participants engaged when the conversation jumps to the business and makes sure the late comers haven't missed important content.[1]

After the casual conversation, you can ease participants into the meeting content by having everyone introduce themselves or conducting a roll call. Introductions are especially important when there are new members or guest speakers. Having everyone introduce themselves as the first official agenda item is a good way to help participants keep track of others and how they're contributing to the meeting.[1]

In the Setting an Agenda and Remote Meeting Guidelines section, we covered the importance of determining the need for a meeting by defining the objectives and desired outcomes. To help encourage engagement with your participants, **state the meeting objective and desired outcomes**. This engagement tool can follow the introductions. Then present the agenda and walk through what you expect participants to talk about and discuss.[4] Up to 40% of the population is comprised as introverts. Introverts may feel less comfortable speaking up during in-person and remote meetings. Building in opportunities for everyone to have a voice will help improve engagement. For example during discussions, you could set up feedback in a round robin where every participant shares. For other ideas of how to engage participants remotely check out chapter 3 of The Ultimate Guide to Effective Remote Collaboration.

Casual conversation, introductions, and building opportunities for everyone to speak are important for both in-person and remote meetings. However, for remote meetings there are some additional ways to promote engagement among participants. For remote meetings, frequent check-ins with participants are needed. Plan to engage or check in with participants every 10 minutes.[8] After 10 minutes, participants' attention will start to wander. The check-in will reel participants attention back in to the discussion.[6, 8]

LIFE CYCLE 3: AFTER THE MEETING



Remote Meeting Follow-ups and Clear Next Steps

> **"*Make sure everyone knows which ball is in whose court*"**

Part of the success of future meetings will depend upon your success in completing your action items and other follow-up tasks.[2] If you follow the steps outlined in this document, hopefully at the end of your remote meeting participants will feel better about the project and have more understanding about the next steps.[6] Hence every participant needs to leave the meeting with a clear idea of action items, who is responsible, and deadline.[1] To ensure action items and tasks are completed you should conduct a follow-up with meeting participants during four different times: end of meeting, day after meeting, one week after, and one month after the meeting occurred (*see Appendix A: Remote Meeting Task Checklist*).[2, 3]

End of Meeting Follow-up

The first opportunity to conduct a follow-up with your participants is at the end of the meeting. The ways you can follow-up with participants at the end of the meeting is to sum up the action items and decisions. As part of the review of action items make sure that individuals are assigned and with a deadline or a time for each item's completion or progress report.[6]

Pro Tip **This is the point in the meeting where you can circle back to any off-topic (parking lot) issues that came up during the meeting.[6]**

One Day After Meeting Follow-up

It seems simple, but one of the most important tasks to complete within a day after the meeting is to review the minutes. If you wait too long to review it will be harder to catch missing or incorrectly captured action items and decisions. As part of the day after review, you will also determine what needs to be done, who is responsible, and a due date. The next task you will need to complete the day after the meeting is to send the minutes to the participants and those not able to attend the meeting.[4] The advantage of having remote meetings and using a tool is that you can record the meeting for those unable to attend and for reference. Send the link to the recording along with the notes to everyone who would normally be part of your meeting.[6] Another helpful task is to create a reminder in your calendar for the day after an action is due for follow-up.[2, 3]

One Week After Meeting Follow-up

About a week after the meeting, you will want to conduct a simple checkup following up on assignments to ensure everyone understands their responsibilities.[4] At this point you should ask if you can help. If there are any action items you are responsible for, it is a good idea to list your own update as you ask for others. By regularly checking in, you'll give yourself the opportunity to make small improvements and adjustments over time.[2, 3]

Pro Tip **Checkup example: *"Hey, I'd like to follow up on the action items listed below. Regarding item X that was assigned to me, I'm done with that action item as of yesterday."***

One Month After Meeting Follow-up

A month after the meeting, participants have had time to review the action items and decisions and understand the items for which they are responsible. At the one month post-meeting you should check in with participants, asking "*What could we do to improve the effectiveness of these meetings*?"[2, 3] While some suggestions might not be feasible, try to integrate those that are.

AFTER THE MEETING CONSIDERATIONS: What happens if somebody did not complete the assigned action item? Focus on the obstacles that prevented the action item from being completed. This puts the emphasis on the problem and not the person.[2, 3]

References Cited

1. deBara, D. *The ultimate guide to remote meetings in 2020*. January 2, 2020 [cited 3/19/20; Available from: https://slackhq.com/ultimate-guide-remote-meetings.
2. National EMS for Children Data Analysis Resource Center (NEDARC), *Tools and Skills for Engaging Stakeholders*, A. Genovesi, Editor. 2017, National EMS for Children Data Analysis Resource Center: University of Utah, Depatment of Pediatrics, Division of Critical Care, Data Coordinating Center.
3. MacLeod, L., *Conducting a well-managed meeting.* Physician executive, 2011. **37**(6): p. 80-86.
4. Osman, H., *Better Virtual Meetings: How to Lead Effective Meetings*. Udemy.com.
5. Allen, J.A., N. Lehmann-Willenbrock, and S.G. Rogelberg, *Let's get this meeting started: Meeting lateness and actual meeting outcomes.* Journal of Organizational Behavior, 2018. **39**(8): p. 1008-1021.
6. Phillips, J. *How to run effective meetings. Five principles for getting more done as a team*. November 6, 2018 [cited 3/30/20; Available from: https://slackhq.com/run-effective-meetings.
7. Klahn, K. *The Ugly Truth About Meetings*. 2003 [cited 4/1/20; Available from: https://visual.ly/community/Infographics/business/ugly-truth-about-meetings.
8. Medina, J., *Brain rules: 12 principles for surviving and thriving at work, home, and school*. 2011: ReadHowYouWant. com.

Appendix A: Remote Meeting Task Checklist

Remote Meeting Task Checklist

3-4 Months Before Meeting Tasks	☐ Choose a remote meeting tool ☐ Book/reserve meeting room (see *Figure 1*) ☐ Schedule meeting based on room and participant availability ☐ Set up the remote meeting calendar event(s) and send to participants ☐ Plan your agenda: determine objectives, outcomes, and meeting type ☐ Designate facilitator for meeting
1 Month Before Meeting Tasks	☐ Set an agenda (*see Appendix B: Generic Agenda Template*)
1 Week Before Meeting Tasks	☐ Send agenda to participants for review and feedback ☐ Send meeting assigned tasks (e.g., note-taker, time-keeper) ☐ Send materials for participant review before attending meeting
5-30 Minutes Before Meeting Tasks	☐ Test technology and AV (*see Appendix C: Technology Checklist*) ☐ Ensure meeting room is set up as required

During Meeting Tasks	☐ Start the meeting on time ☐ Set the meeting norms ☐ Review agenda ☐ Review outstanding action items from previous meetings ☐ End with a summary of action items and decisions ☐ If applicable, schedule next meeting date

1 Day After Meeting Tasks	☐ Review meeting minutes and send to participants ☐ Send link of remote meeting recording ☐ Create a reminder in your calendar for the day after an action is due for follow-up
1 Week After Meeting Tasks	☐ Conduct a simple checkup following up on assignments to ensure everyone understands their responsibilities
1 Month After Meeting Tasks	☐ Check in with participants, asking "*What could we do to improve the effectiveness of these meetings*?"

Appendix B: Generic Agenda Template

MEETING AGENDA

Date:
Time:
Location:
Remote Meeting logistics (link and conference number):
Attendees:
Assigned Note Taker:

Participant Preparation for Meeting	
Please Read: the action items from the last meeting	**Please Bring**: your answers to your assigned action items below

I	Open Meeting
	The objective of this meeting is to….

II	Action Items From Previous Meeting	Responsible	Due Date
1			
2			
3			
4			
5			
6			
7			
8			
9			

III	Agenda Topic	Presenter/ Facilitator	Duration
	REVIEW ACTION ITEMS: See above		XX min
Projects & Activities			
1			X min
2			X min
3			X min
4			X min
5			X min
6			X min
7			X min
8			X min
9	Other Items		X min

Notes: NEW Action Items and Decisions

Action Items Status from Previous Meeting

1.
2.
3.
4.
5.

6.
7.
8.
9.

Agenda Topics and Associated Action Items/Decisions

1.

Action Item	Responsible parties	Due date

Decisions

2.

Action Item	Responsible parties	Due date

Decisions

3.

Action Item	Responsible parties	Due date

Decisions

4.

Action Item	Responsible parties	Due date

Decisions

5.

Action Item	Responsible parties	Due date

Decisions

6.

Action Item	Responsible parties	Due date

Decisions

7.

Action Item	Responsible parties	Due date

Decisions

8.

Action Item	Responsible parties	Due date

Decisions

9.

Action Item	Responsible parties	Due date

Decisions

Appendix C: Technology Checklist

TECHNOLOGY CHECKLIST

Phone Conference		Remote Meeting	
Share correct call-in number with all participants	☐	Provide all participants correct login information	☐
Quiet background noises (fans, music, phones)	☐	All participants install remote meeting tool (if necessary)	☐
Share keyboard commands for mute, unmute (if conferencing on phone)	☐	Get and install a high-quality webcam	☐
Beginning of call check-in	☐	Test webcam prior to meeting	☐
Beginning of call: all non-speaking participants mute their line	☐	Install high-quality microphone and headset	☐
		Test microphone and headset prior to meeting	☐
Audio-Visual		Shut down unnecessary computer programs	☐
Set up projection screen	☐	At beginning of call everyone checks in	☐
Set up and focus projector	☐	Test sharing your screen/document	☐
Connect computer to projector	☐	**Notes**	
Test presentation on projector	☐		
Test video on projector (if using video)	☐		
Test wireless remote with computer & presentation	☐		
Install fresh batteries in presentation remote	☐		
Connect computer to speakers (if using audio)	☐		
Test sound and adjust on presentation or video (if using audio)	☐		
Install fresh batteries in microphone and receiver (if using a microphone)	☐		
Test microphone and adjust sound system (if using microphone)	☐		
Adjust room lighting as needed	☐		
Quiet background noises (fans, music, phones)	☐		
Close email and messaging clients to prevent audio/video interruptions	☐		

This resource was created by the

NEDARC
The National EMSC Data Analysis Resource Center

University of Utah, Department of Pediatrics
295 Chipeta Way
PO Box 581289
Salt Lake City, UT 84158-1289
www.nedarc.org