NSP | Nonprofit Support Program
HARTFORD FOUNDATION FOR PUBLIC GIVING

How to Develop and Lead Successful Virtual Sessions

The webinar will begin at 12:00 Noon.

the goodman center
where do-gooders learn to do better

WELCOME | FACILITATORS

Andy Goodman
Director
(he, him, his)

the goodman center
where do-gooders learn to do better

WELCOME | FACILITATORS

Andy Goodman
Director
(he, him, his)

Kirsten Farrell
Operations Mgr.
(she, her, hers)

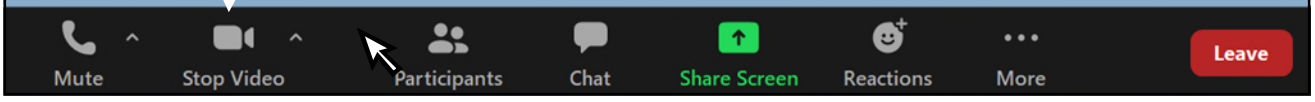
Desktop

Mute / Unmute

Camera on/off is up to you.

zoom

Chat



Mobile

Mute / Unmute
Chat

BEFORE WE BEGIN | COMMUNITY AGREEMENTS

- We believe interaction makes for a better webinar, so we call on people occasionally. If you would rather *not* be called on, please let us know in the chat box.
- The ability to multitask while on Zoom can be tempting. We encourage you to stay strong. Avoid temptation!
- **Anything you'd like to add?** (Please use the chat box.)

BEFORE WE BEGIN | AFTER-CLASS TIME

If you don't have to rush off at 2 PM, Andy and Kirsten will be staying online after the webinar has concluded for any participants with questions, comments or other business.

Just remain connected.

SUCCESSFUL VIRTUAL SESSIONS | AGENDA

1. **Context:** How we got here (and where, exactly, are we?)
2. **Defining Terms:** All virtual sessions are not the same
3. **Nine Takeaways:** What we learned from the research
4. **Resources:** A little more help for our friends

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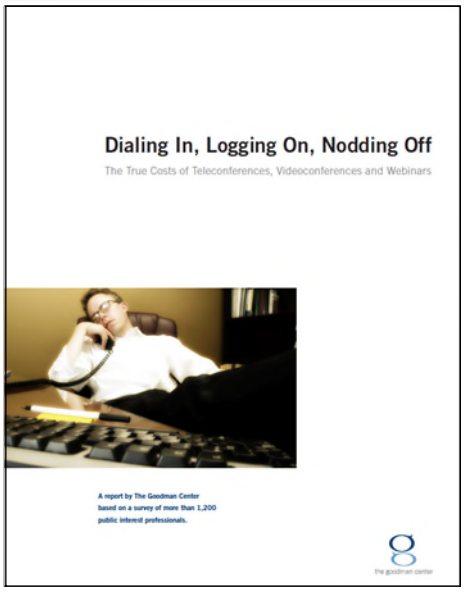

CONTEXT | We've been down this road before…

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- Launched "The Webinar on Webinars" (2009) to share best practices.

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- Great Recession of 2008 led to major surge in videoconferencing.
- Conducted research to identify problems and trends.
- Launched "The Webinar on Webinars" (2009) to share best practices.
- Logged hundreds of hours teaching and learning from students (2009-2020).

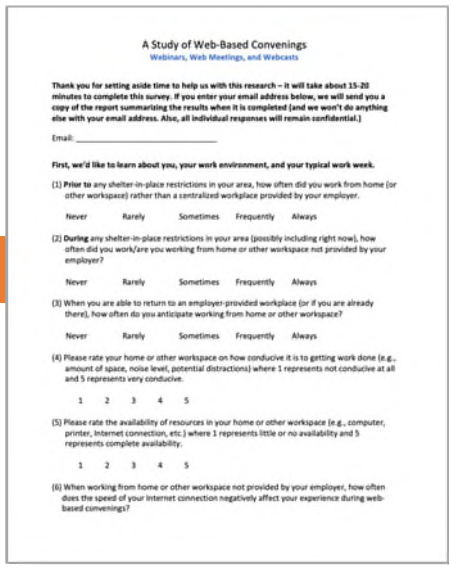
June 2, 2020

CONTEXT | And in March 2020, everything changed…

CONTEXT | …and everything we did started to look like this.

CONTEXT | NEW RESEARCH (JULY-AUGUST 2020)

4,405 RESPONDENTS



A Study of Web-Based Convenings

Webinars, Web Meetings, and Webcasts

Thank you for setting aside time to help us with this research – it will take about 15-20 minutes to complete this survey. If you enter your email address below, we will send you a copy of the report summarizing the results when it is completed (and we won't do anything else with your email address. Also, all individual responses will remain confidential.)

Email: _____

First, we'd like to learn about you, your work environment, and your typical work week.

(1) **Prior to** any shelter-in-place restrictions in your area, how often did you work from home (or other workspace) rather than a centralized workplace provided by your employer.

Never Rarely Sometimes Frequently Always

(2) **During** any shelter-in-place restrictions in your area (possibly including right now), how often did you work/are you working from home or other workspace not provided by your employer?

Never Rarely Sometimes Frequently Always

(3) When you are able to return to an employer-provided workplace (or if you are already there), how often do you anticipate working from home or other workspace?

Never Rarely Sometimes Frequently Always

(4) Please rate your home or other workspace on how conducive it is to getting work done (e.g., amount of space, noise level, potential distractions) where 1 represents not conducive at all and 5 represents very conducive.

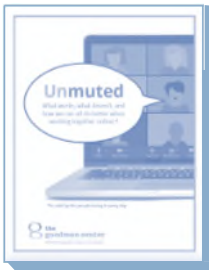
1 2 3 4 5

(5) Please rate the availability of resources in your home or other workspace (e.g., computer, printer, Internet connection, etc.) where 1 represents little or no availability and 5 represents complete availability.

1 2 3 4 5

(6) When working from home or other workspace not provided by your employer, how often does the speed of your Internet connection negatively affect your experience during web-based convenings?

CONTEXT | NEW RESEARCH (JULY-AUGUST 2020)



NONPROFIT/NGO	48%
EDUCATION	43%
PHILANTHROPY (E.G., FOUNDATIONS)	22%
GOVERNMENT AGENCY	9%
OTHER	7%
COMMERCIAL	4%
PREFER NOT TO ANSWER	1%

(Note: total exceeds 100% since respondents could choose all sectors that applied to them.)

SUCCESSFUL VIRTUAL SESSIONS | AGENDA

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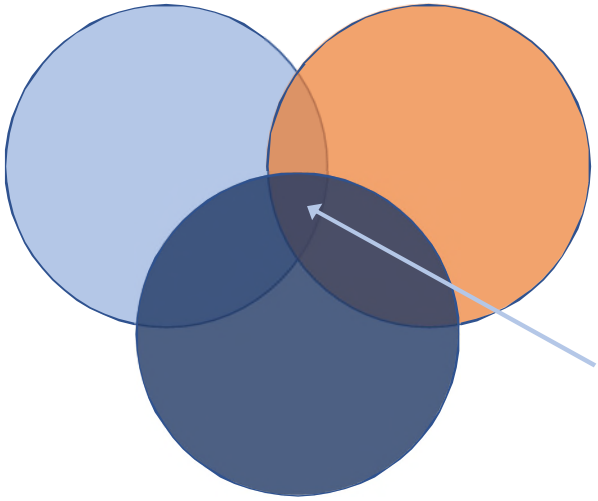
DEFINING TERMS | CATEGORIES OF ONLINE CONVENINGS

WEBINAR
Information Sharing/Teaching or Training



WEB MEETING
Discussion, Decision-Making

WEB CONFERENCE
Comprised of all three categories

WEBCAST
Speech/Presentation

SUCCESSFUL VIRTUAL SESSIONS | AGENDA

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TAKEAWAY #1 ENGAGEMENT & PARTICIPATION

The adventure begins here.

Keeping people focused and actively participating is your first and foremost challenge. There are plenty of tools to help you do both.

SURVEY DATA

#1 ENGAGEMENT & PARTICIPATION

WHAT MAKES AN ONLINE CONVENING A POSITIVE EXPERIENCE?

ENGAGING PRESENTATION/FACILITATION	45%
DESIGNING AND FOLLOWING A CLEAR STRUCTURE	37%
USING PLATFORM TOOLS TO PROMOTE INTERACTION	31%

SURVEY DATA

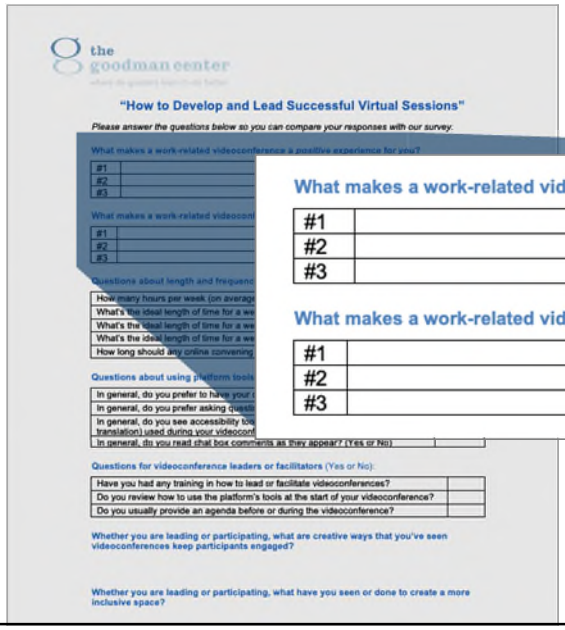
#1 ENGAGEMENT & PARTICIPATION

WHAT MAKES AN ONLINE CONVENING A NEGATIVE EXPERIENCE?

TECHNICAL PROBLEMS	20%
LACK OF ENGAGEMENT	17%
TOO LONG	15%
NO STRUCTURE	15%
POOR FACILITATION	15%

YOUR RESPONSES

#1 ENGAGEMENT & PARTICIPATION


the goodman center

"How to Develop and Lead Successful Virtual Sessions"

Please answer the questions below so you can compare your responses with our survey.

What makes a work-related videoconference a *positive* experience for you?

#1	
#2	
#3	

What makes a work-related videoconference a *negative* experience for you?

#1	
#2	
#3	

Questions about length and frequenc

How many hours per week (on averag	
What's the ideal length of time for a we	
What's the ideal length of time for a we	
What's the ideal length of time for a we	
How long should any online convening	

Questions about using platform tools

In general, do you prefer to have your c	
In general, do you prefer asking questi	
In general, do you see accessibility too	
translation) used during your videoconf	
In general, do you read chat box comments as they appear? (Yes or No)	

Questions for videoconference leaders or facilitators (Yes or No):

Have you had any training in how to lead or facilitate videoconferences?	
Do you review how to use the platform's tools at the start of your videoconference?	
Do you usually provide an agenda before or during the videoconference?	

Whether you are leading or participating, what are creative ways that you've seen videoconferences keep participants engaged?

Whether you are leading or participating, what have you seen or done to create a more inclusive space?

SURVEY DATA

#1 ENGAGEMENT & PARTICIPATION

HOW OFTEN DO YOU FIND YOURSELF MULTI-TASKING DURING:

	NEVER	RARELY	SOMETIMES	FREQUENTLY	ALWAYS
WEB MEETINGS	1%	13%	40%	38%	9%
WEBINARS	1%	7%	34%	45%	13%
WEBCASTS	1%	7%	35%	41%	16%

RESPONDENTS ARE MULTI-TASKING
IN THE FREQUENTLY-ALWAYS RANGE
AT LEAST 47% OF THE TIME.

RECOMMENDATIONS

#1 ENGAGEMENT & PARTICIPATION

Provide something to do right from the start.

Points to ponder while we wait for everyone to log on

"I believe in the power of storytelling. Stories open our hearts to a new place, which opens our minds, which often leads to action."

Melinda Gates

RECOMMENDATIONS

#1 ENGAGEMENT & PARTICIPATION

Provide something to do right from the start.

Look for ways to ask questions.

Web Page Design

"We recorded how 232 users looked at thousands of Web pages. We found that users' main reading behavior was fairly consistent across many different sites and tasks. This dominant reading pattern looks somewhat like an F."

Jakob Nielsen, *Alertbox*
April 17, 2006

RECOMMENDATIONS

#1 ENGAGEMENT & PARTICIPATION

Provide something to do right from the start.

Look for ways to ask questions.

Pop Quiz: Question 2

According to eye-tracking studies, your eyes are most likely to follow which pattern?

RECOMMENDATIONS

#1 ENGAGEMENT & PARTICIPATION

Provide something to do right from the start.

Look for ways to ask questions.

Managing vs. Leading

Managing	Leading
•Keeps things running smoothly	• Provides vision for a viable future
•Accepts & maintains the status quo	• Questions the way things are
•Keeps others on track and accountable	• Inspires through trust and empowers others
•Works within context	• Masters their context
•Repeating what's worked in the past	• Creative adaptation to new situations

RECOMMENDATIONS

#1 ENGAGEMENT & PARTICIPATION

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Look for ways to ask questions.

Managing or Leading?

1. Keeps things running smoothly
2. Masters their context
3. Keeps others on track and accountable
4. Questions the way things are
5. Repeating what's worked in the past
6. Provides vision for a viable future
7. Works within context
8. Inspires through trust and empowers others
9. Accepts and maintains the status quo
10. Creative adaptation to new situations

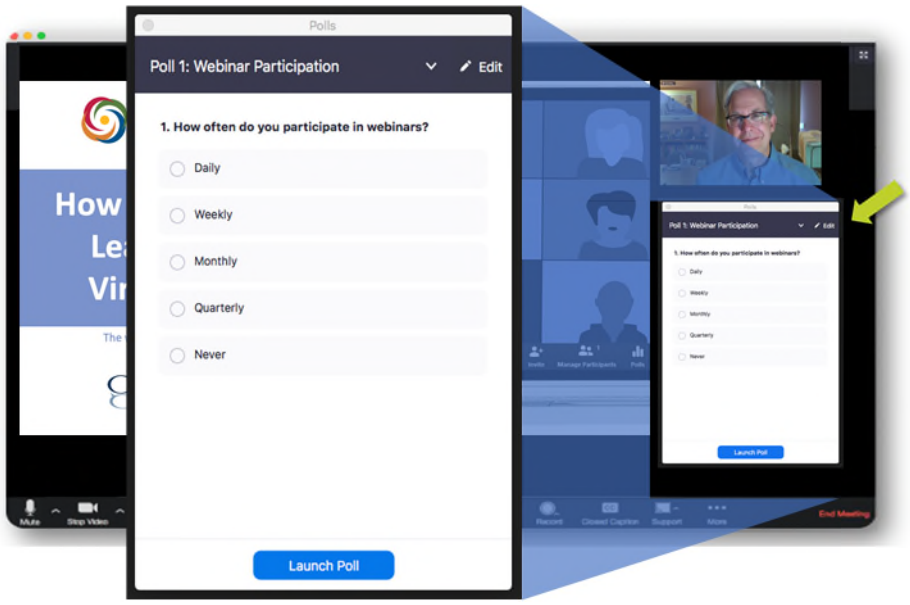
RECOMMENDATIONS

#1 ENGAGEMENT & PARTICIPATION

Provide something to do right from the start.

Look for ways to ask questions.

Use polls



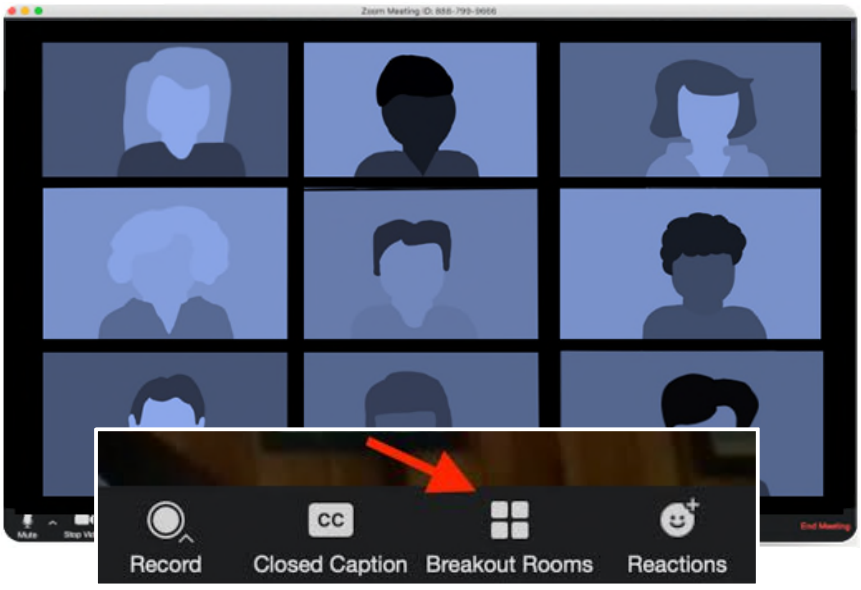
RECOMMENDATIONS

#1 ENGAGEMENT & PARTICIPATION

Provide something to do right from the start.

Look for ways to ask questions.

Use polls, breakout rooms



RECOMMENDATIONS

#1 ENGAGEMENT & PARTICIPATION

2 People, 2 Questions

- What gets you up in the morning?
- What do you hope to get from participating in this cohort training?

FMA

RECOMMENDATIONS

#1 ENGAGEMENT & PARTICIPATION

RECOMMENDATIONS

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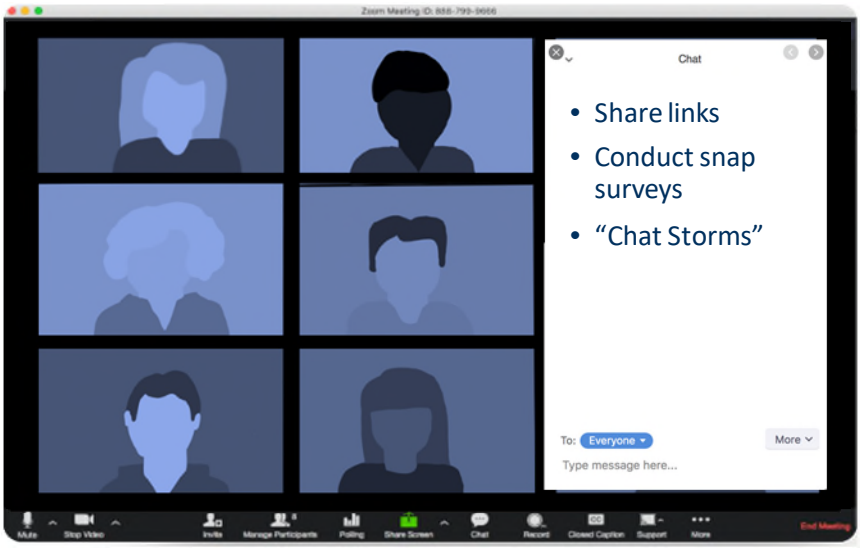
Provide something to do right from the start.

Look for ways to ask questions.

Use polls, breakout rooms, and chat.



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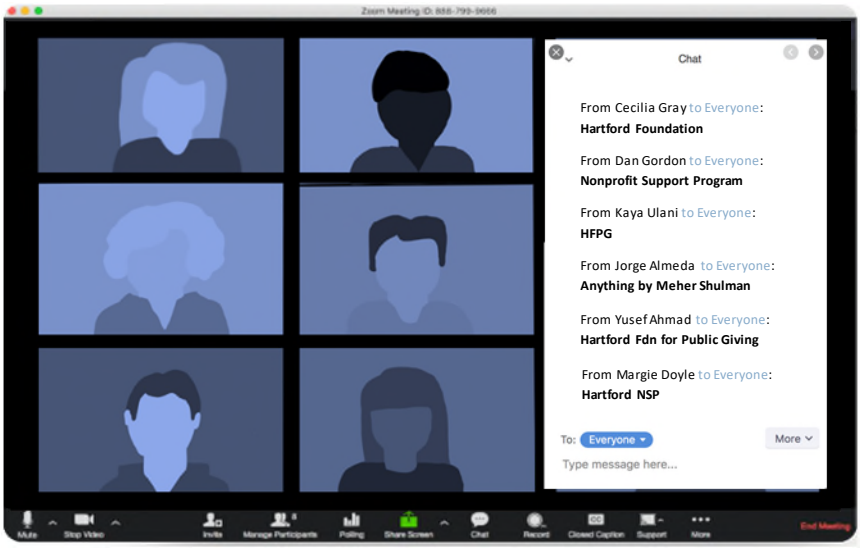

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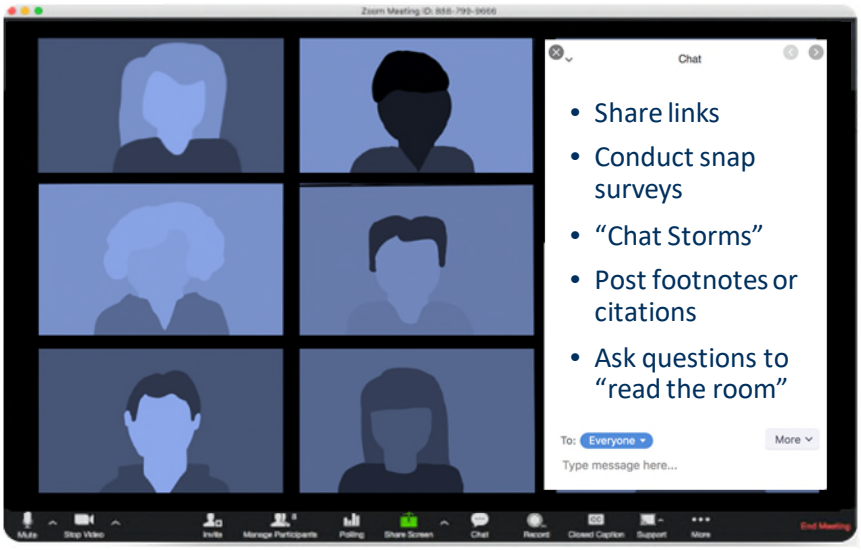


RECOMMENDATIONS

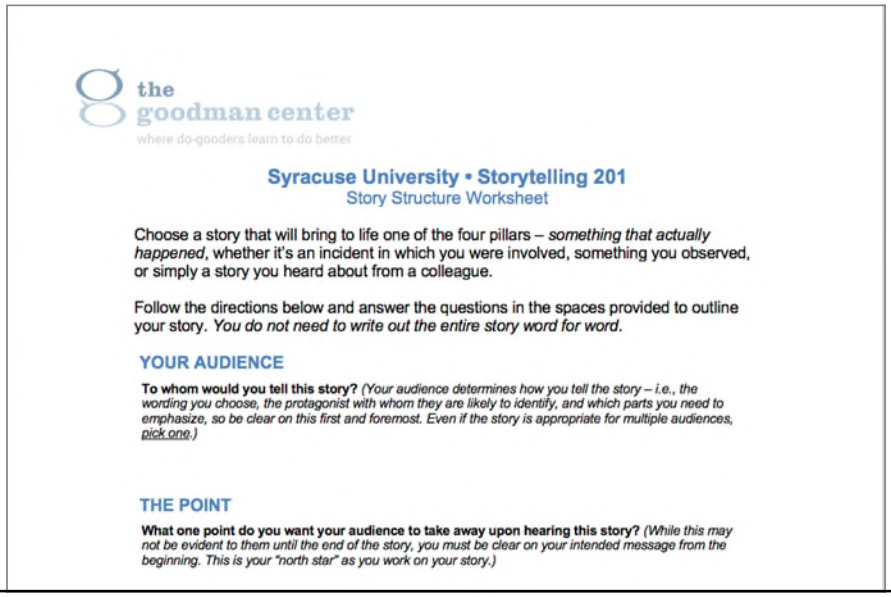
#1 ENGAGEMENT & PARTICIPATION

Provide something to do right from the start.

Look for ways to ask questions.

Use polls, breakout rooms, and chat.

Conduct some activities off-line.



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where do-gooders learn to do better

Syracuse University • Storytelling 201

Story Structure Worksheet

Choose a story that will bring to life one of the four pillars – *something that actually happened*, whether it's an incident in which you were involved, something you observed, or simply a story you heard about from a colleague.

Follow the directions below and answer the questions in the spaces provided to outline your story. *You do not need to write out the entire story word for word.*

YOUR AUDIENCE

To whom would you tell this story? *(Your audience determines how you tell the story – i.e., the wording you choose, the protagonist with whom they are likely to identify, and which parts you need to emphasize, so be clear on this first and foremost. Even if the story is appropriate for multiple audiences, pick one.)*

THE POINT

What one point do you want your audience to take away upon hearing this story? *(While this may not be evident to them until the end of the story, you must be clear on your intended message from the beginning. This is your "north star" as you work on your story.)*

RECOMMENDATIONS

#1 ENGAGEMENT & PARTICIPATION

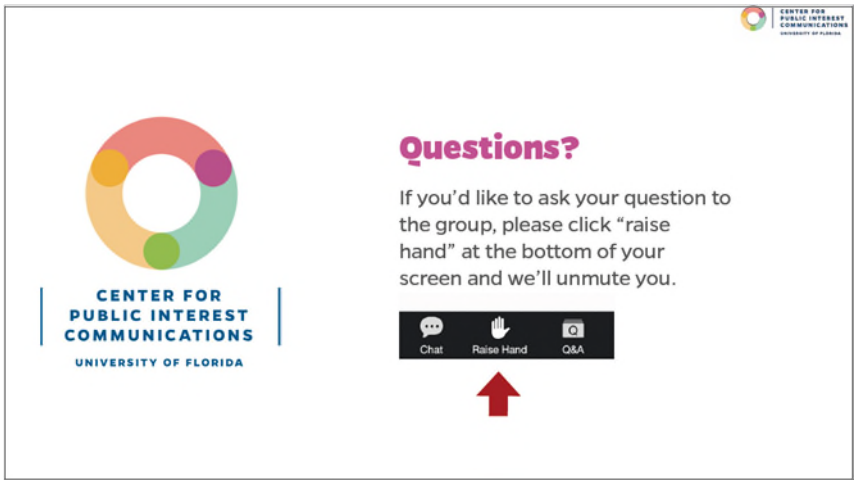
Provide something to do right from the start.

Look for ways to ask questions.

Use polls, breakout rooms, and chat.

Conduct some activities off-line.

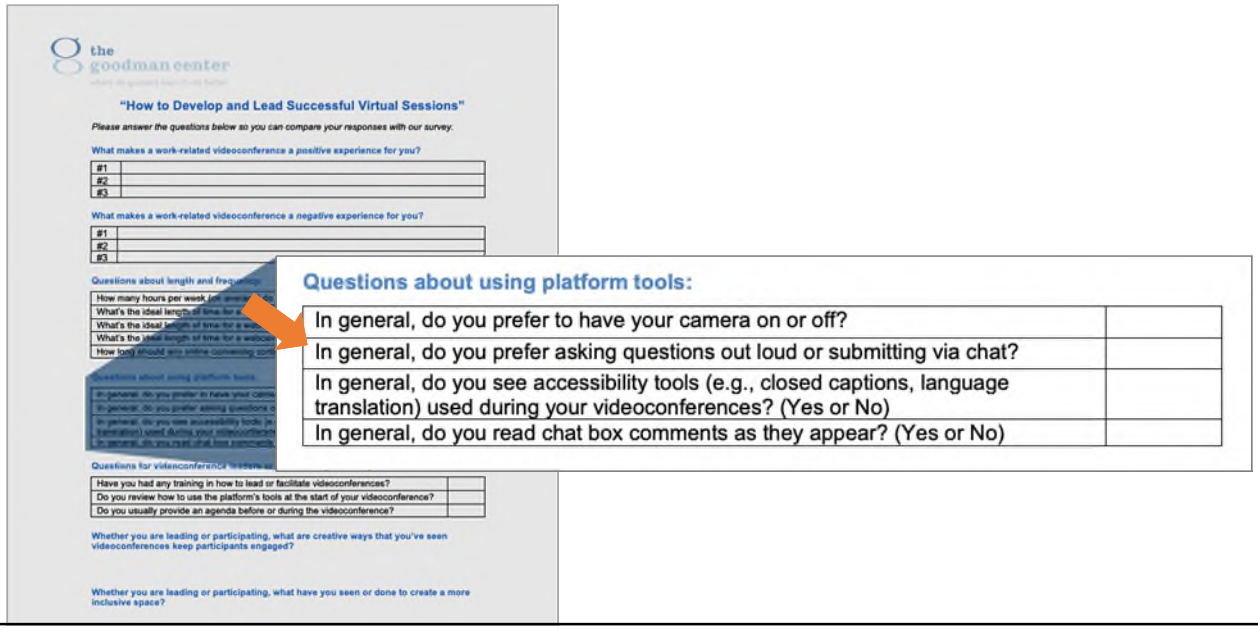
Take questions frequently (and call on people.)



Design slides to remind participants how to ask questions.

YOUR RESPONSES

#1 ENGAGEMENT & PARTICIPATION



SURVEY DATA

#1 ENGAGEMENT & PARTICIPATION

HOW OFTEN DO YOU PREFER ASKING QUESTIONS OUT LOUD AS OPPOSED TO ENTERING ALL QUESTIONS IN A CHAT OR Q&A BOX?

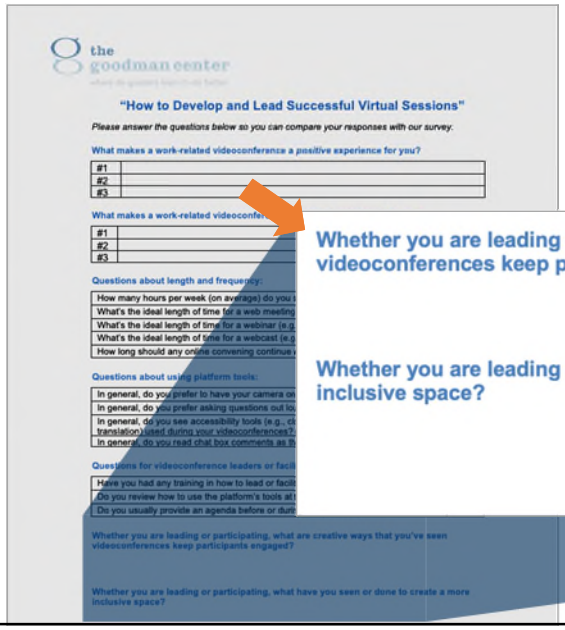
	NEVER	RARELY	SOMETIMES	FREQUENTLY	ALWAYS
WEB MEETINGS	2%	10%	39%	40%	10%
WEBINARS	14%	37%	32%	12%	4%

WEBINARS:
PREFER TO CHAT

MEETINGS:
PREFER TO SPEAK

YOUR RESPONSES

#1 ENGAGEMENT & PARTICIPATION



Whether you are leading or participating, what are creative ways that you've seen videoconferences keep participants engaged?

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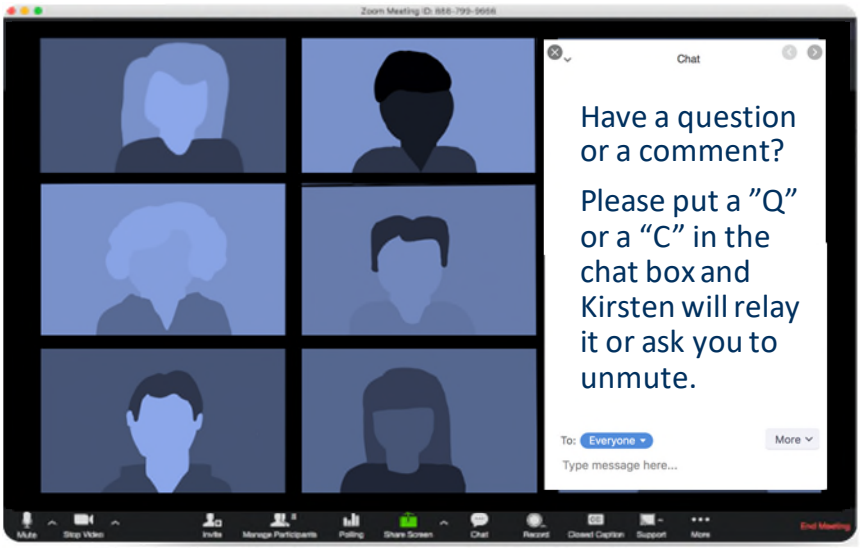
QUESTIONS & COMMENTS

?



!

TAKEAWAY #2 INCLUSIVITY

Our virtual welcome mats need some work.

While attention is being paid to making online convenings more inclusive, there is plenty of room for improvement, particularly where accessibility is concerned.

SURVEY DATA

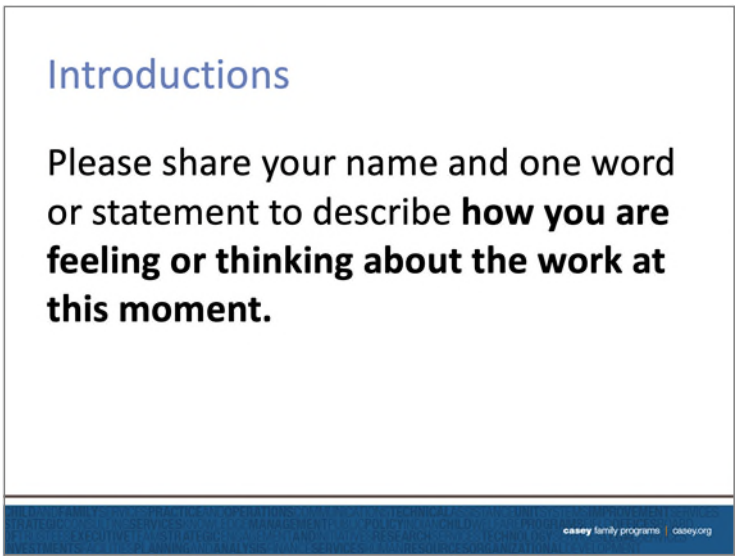
#2 INCLUSIVITY

SHOULD SOMETHING THIS FUNDAMENTAL BE A **SOMETIMES** THING (LEANING TOWARDS RARELY)**?**

RECOMMENDATIONS | CHECKING IN

#2 INCLUSIVITY

Give participants a chance to check in, formally or informally.



RECOMMENDATIONS | AGREEMENTS

#2 INCLUSIVITY

Give participants a chance to check in, formally or informally.

Be clear on the rules of engagement (or work with participants to establish them.)

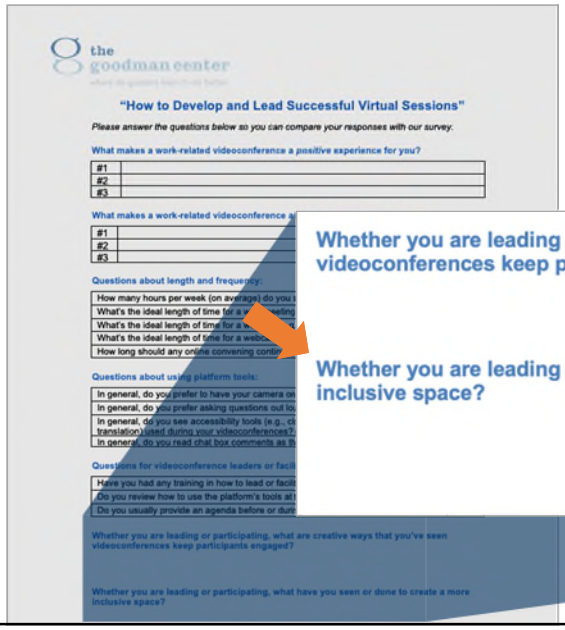
Agreements

- Try on new ideas and ways of doing things
- Okay to disagree
- Be aware of both intent and impact
- Practice BOTH/AND thinking
- Move up/move up
- Manage our technology
- We are accountable to these agreements & each other

casey family programs | casey.org

YOUR RESPONSES

#1 ENGAGEMENT & PARTICIPATION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Please answer the questions below so you can compare your responses with our survey.

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What makes a work-related videoconference a

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SURVEY DATA | ACCESSIBILITY

#2 INCLUSIVITY

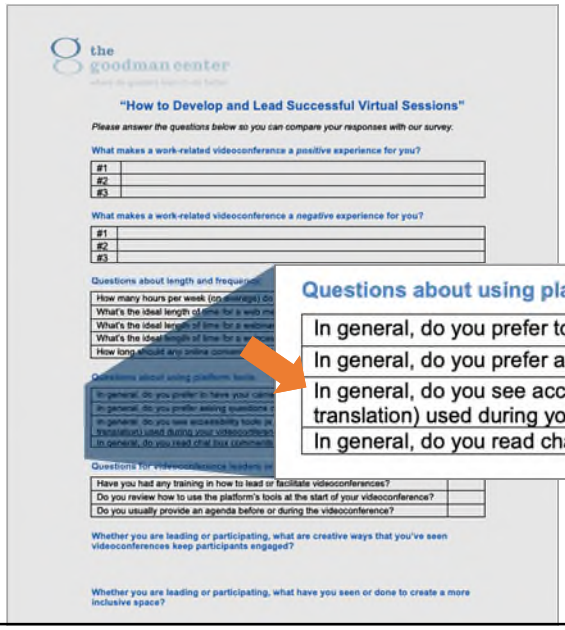
HOW OFTEN HAVE YOU SEEN CONVENING LEADERS OR FACILITATORS CREATE GREATER ACCESSIBILITY FOR THE CONTENT (E.G., CLOSED CAPTIONING, LANGUAGE TRANSLATION) FOR:

	NEVER	RARELY	SOMETIMES	FREQUENTLY	ALWAYS
ALL CONVENINGS	43%	38%	15%	4%	1%
WEB MEETINGS	34%	41%	16%	7%	2%
WEBINARS	24%	37%	18%	9%	3%
WEBCASTS	22%	41%	25%	10%	2%

ACCESSIBILITY IS ADDRESSED
FREQUENTLY-ALWAYS
12% OF THE TIME *AT BEST*

YOUR RESPONSES

#2 INCLUSIVITY

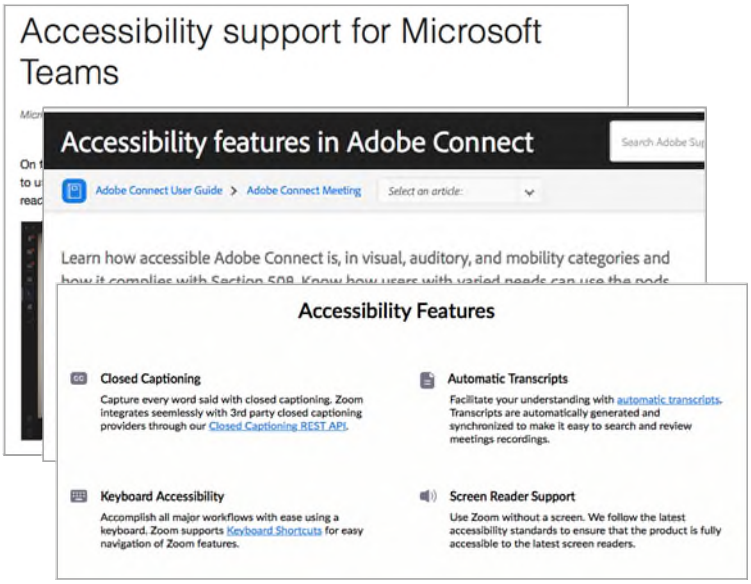


RECOMMENDATIONS | ACCESSIBILITY #2 INCLUSIVITY

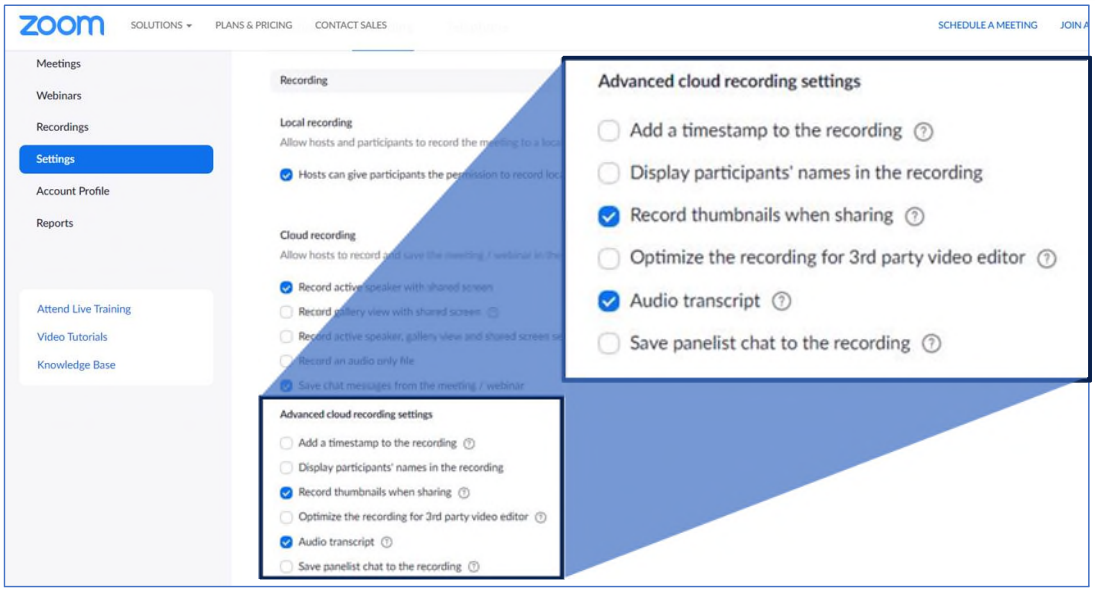
Give participants a chance to check in, formally or informally.

Be clear on the rules of engagement (or work with participants to establish them.)

Know your platform's accessibility tools.



RECOMMENDATIONS | ACCESSIBILITY #2 INCLUSIVITY



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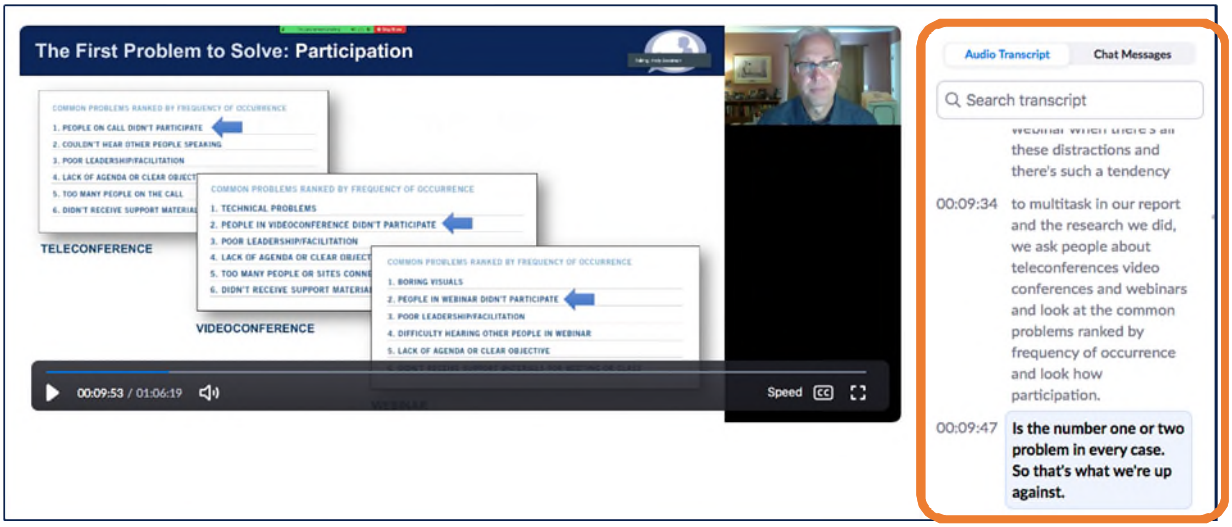

RECOMMENDATIONS | ACCESSIBILITY #2 INCLUSIVITY

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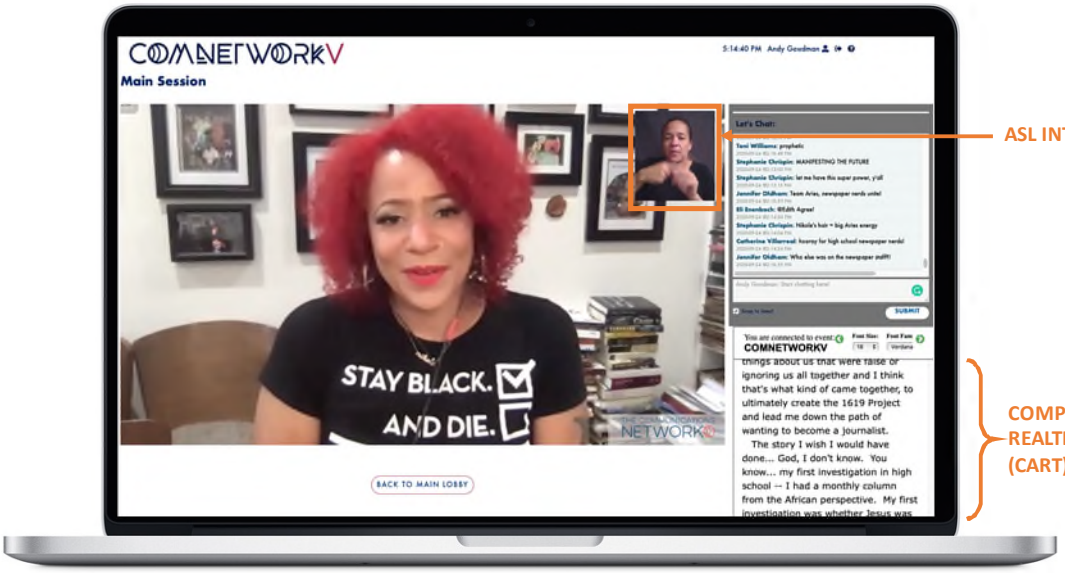
CLOSED CAPTION will appear as option in Zoom menu bar.

RECOMMENDATIONS | ACCESSIBILITY #2 INCLUSIVITY

CLOSED CAPTION will appear as option in Zoom menu bar.

Click on it and options will appear for you or someone else to start transcribing.

RECOMMENDATIONS | ACCESSIBILITY #2 INCLUSIVITY



Communications Network Virtual Conference (September 23-25, 2020)

RECOMMENDATIONS | ACCESSIBILITY #2 INCLUSIVITY

Give participants a chance to check in, formally or informally.

Be clear on the rules of engagement (or work with participants to establish them.)

Know your platform's accessibility tools.

Discover PowerPoint's accessibility tools.

Present with real-time, automatic captions or subtitles in PowerPoint

PowerPoint for Microsoft 365, PowerPoint for Microsoft 365 for Mac, More...

PowerPoint for Microsoft 365 can transcribe your words as you present and display them on-screen as captions in the same language you are speaking, or as subtitles translated to another language. This can help accommodate individuals in the audience who may be deaf or hard of hearing, or more familiar with another language, respectively.

There are also position, size, color, and other appearance options for the captions and subtitles to accommodate different environments and audience needs.

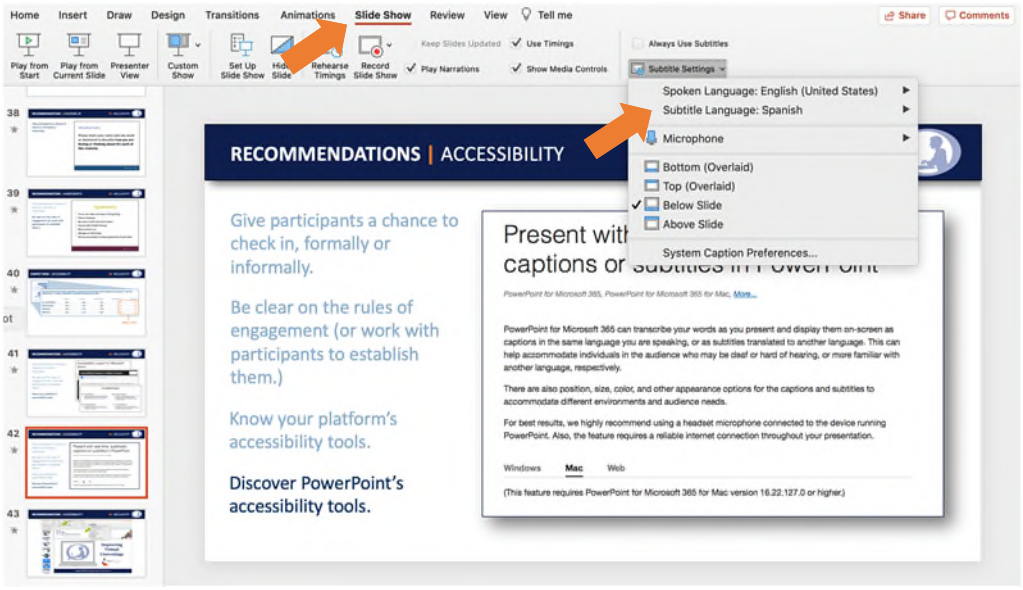
For best results, we highly recommend using a headset microphone connected to the device running PowerPoint. Also, the feature requires a reliable internet connection throughout your presentation.

Windows **Mac** Web

(This feature requires PowerPoint for Microsoft 365 for Mac version 16.22.127.0 or higher.)

RECOMMENDATIONS | ACCESSIBILITY

#2 INCLUSIVITY



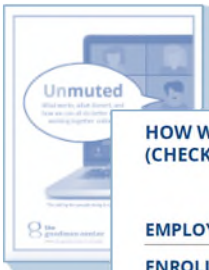
TAKEAWAY #3 LEADERSHIP & FACILITATION

Get training. Get some help. And get better at the basics.

Leading and facilitating online is hard enough as it is. Learning by doing and trying to do it yourself are not recipes for success.

SURVEY DATA

#3 LEADERSHIP & FACILITATION



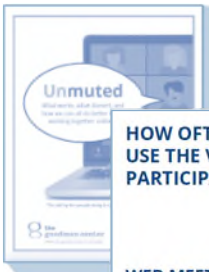
HOW WOULD YOU DESCRIBE THE TRAINING YOU HAVE HAD TO LEAD OR FACILITATE ONLINE CONVENINGS (CHECK ALL THAT APPLY)?

	WEB MEETINGS	WEBINARS	WEBCASTS
EMPLOYER PROVIDED TRAINING	13%	15%	12%
ENROLLED IN TRAINING ON MY OWN	17%	25%	22%
READ ABOUT BEST PRACTICES	46%	60%	60%
STUDIED OTHER PRESENTERS	51%	64%	65%
NO TRAINING	48%	37%	35%

35% to **48%** HAVE NO TRAINING

SURVEY DATA

#3 LEADERSHIP & FACILITATION



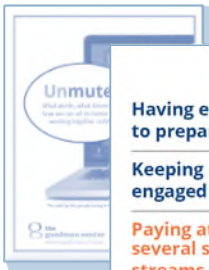
HOW OFTEN DID THE ONLINE CONVENING'S LEADER/FACILITATOR PROVIDE SUFFICIENT INSTRUCTION ON HOW TO USE THE VIDEOCONFERENCING PLATFORM'S VARIOUS TOOLS (E.G., MUTING/UNMUTING, ASKING QUESTIONS, PARTICIPATING IN POLLS)?

	NEVER	RARELY	SOMETIMES	FREQUENTLY	ALWAYS
WEB MEETINGS	4%	22%	37%	31%	6%
WEBINARS	3%	17%	37%	34%	8%
WEBCASTS	9%	24%	38%	25%	3%

57-71% PROVIDE INSTRUCTIONS SOMETIMES OR LESS OFTEN

SURVEY DATA

#3 LEADERSHIP & FACILITATION



	MEETINGS	WEBINARS	WEBCASTS
Having enough time to prepare content	2.4	3.0	3.0
Keeping participants engaged	2.9	3.5	3.4
Paying attention to several simultaneous streams of information	3.1	3.5	3.3
Ensuring participants know how to use all the platform's tools	2.8	3.1	2.9
Dealing with participants who talk or chat excessively	2.7	2.6	2.5
Dealing with technical problems	2.9	3.3	3.1
Knowing how to "read the room"	3.0	3.3	3.0

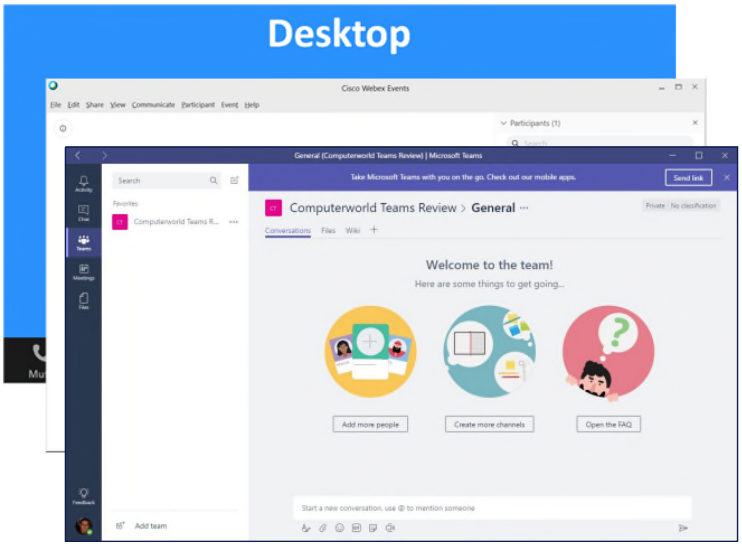
CHALLENGES TO LEADING SUCCESSFUL ONLINE CONVENING (1-5 SCALE)

#1 / #1 / #2

RECOMMENDATIONS | BASICS

#3 LEADERSHIP & FACILITATION

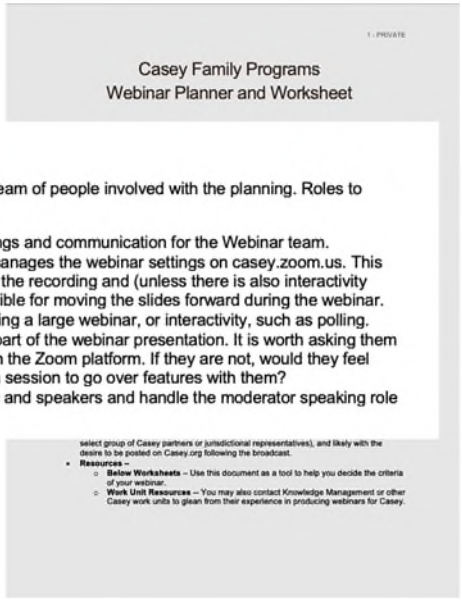
Watch tutorials on your platform or find trainings like this.



RECOMMENDATIONS | BASICS #3 LEADERSHIP & FACILITATION

Watch tutorials on your platform or find trainings like this.

Build 2-3 person teams to facilitate online convenings.



Casey Family Programs
Webinar Planner and Worksheet

Webinar Team Roles

For large webinars, it is best to have a team of people involved with the planning. Roles to consider for your webinar include:

- **Facilitator** – Coordinates the meetings and communication for the Webinar team.
- **Host** - schedules the webinar and manages the webinar settings on casey.zoom.us. This person will also launch and manage the recording and (unless there is also interactivity features such as polling) be responsible for moving the slides forward during the webinar.
- **Co-host** - can manage the Q&A during a large webinar, or interactivity, such as polling.
- **Panelist(s)** – will be speaking as a part of the webinar presentation. It is worth asking them ahead of time if they are familiar with the Zoom platform. If they are not, would they feel more comfortable if you scheduled a session to go over features with them?
- **Content Lead**- to prepare the slides and speakers and handle the moderator speaking role during the session.

RECOMMENDATIONS | BASICS #3 LEADERSHIP & FACILITATION

Watch tutorials on your platform or find trainings like this.

Build 2-3 person teams to facilitate online convenings *(but if you have to fly solo, let your audience know.)*

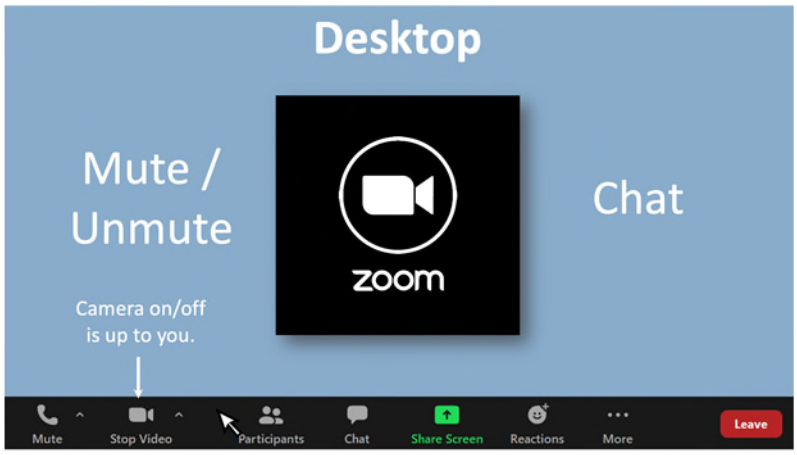
Tony DeSantis | Pennsylvania Dept. of Conservation and Natural Resources

RECOMMENDATIONS | BASICS #3 LEADERSHIP & FACILITATION

Watch tutorials on your platform or find trainings like this.

Build 2-3 person teams to facilitate online convenings.

Always cover the basics (unless you know all participants are familiar with the platform.)



RECOMMENDATIONS | BASICS #3 LEADERSHIP & FACILITATION

BAD LIGHTING

RECOMMENDATIONS | BASICS #3 LEADERSHIP & FACILITATION

BAD FRAMING

RECOMMENDATIONS | BASICS #3 LEADERSHIP & FACILITATION

UNFLATTERING ANGLE

RECOMMENDATIONS | BASICS #3 LEADERSHIP & FACILITATION

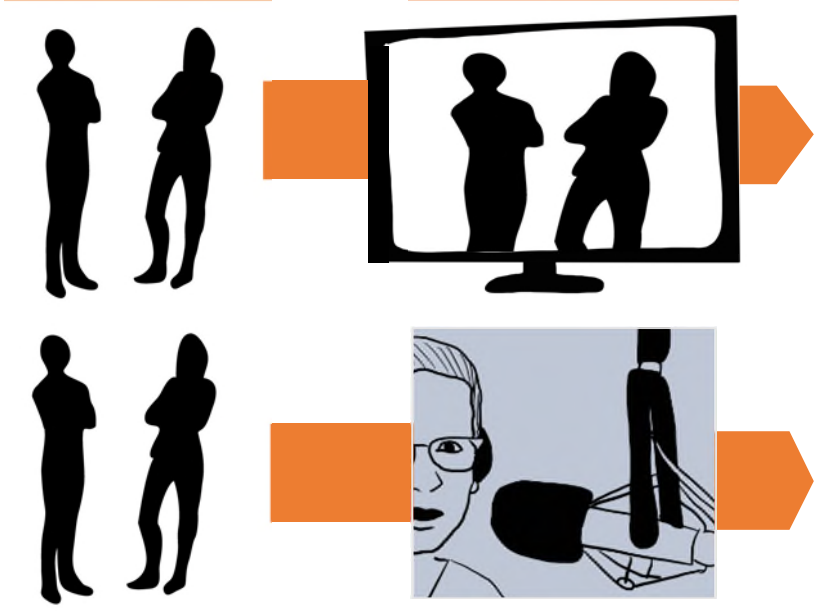
NO EYE CONTACT

RECOMMENDATIONS | BASICS #3 LEADERSHIP & FACILITATION

- ✓ LIGHTING
- ✓ FRAMING
- ✓ BACKGROUND
- ✓ EYE CONTACT

RECOMMENDATIONS | BASICS #3 LEADERSHIP & FACILITATION

RECOMMENDATIONS | BASICS #3 LEADERSHIP & FACILITATION



TELEVISION
+10
POUNDS

RADIO
-10 to 20%
CLARITY

RECOMMENDATIONS | BASICS #3 LEADERSHIP & FACILITATION

The Radio Factor

In radio, they teach announcers to really emphasize or "punch" key words because the audience doesn't have visual cues to help them understand, and because the higher and lower ends of the audio may be lost in the transmission. The telephone can be even worse. So, what may feel like over-emphasizing to you will actually sound normal to the listeners.

RECOMMENDATIONS | BASICS #3 LEADERSHIP & FACILITATION

Consider leading meetings or hosting classes **standing up**.

RECOMMENDATIONS | BASICS

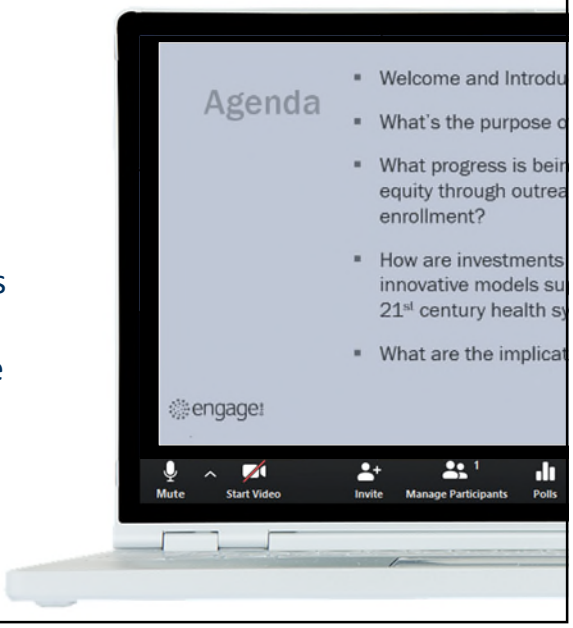
#3 LEADERSHIP & FACILITATION

- Standing desk
  (VariDesk: $295)
- Broadcast quality microphone and pre-amp
  (ElectroVoice mic: $100; Onyx pre-amp: $130)
- Additional lighting
  (Lume Cube: $70)

TAKEAWAY #4 STRUCTURE

More time online requires more attention to structure.

As remote workers log more hours in videoconferences every day, their expectations that meeting and webinar leaders will make good use of their time are rising. Clear, concise agendas help meet those expectations.



SURVEY DATA

#4 STRUCTURE

HOW OFTEN DID THE ONLINE CONVENING LEADER/FACILITATOR PROVIDE AN AGENDA (EITHER IN ADVANCE OF THE MEETING OR AT THE BEGINNING) THAT GAVE THE PARTICIPANTS A CLEAR OUTLINE OF CONTENT?

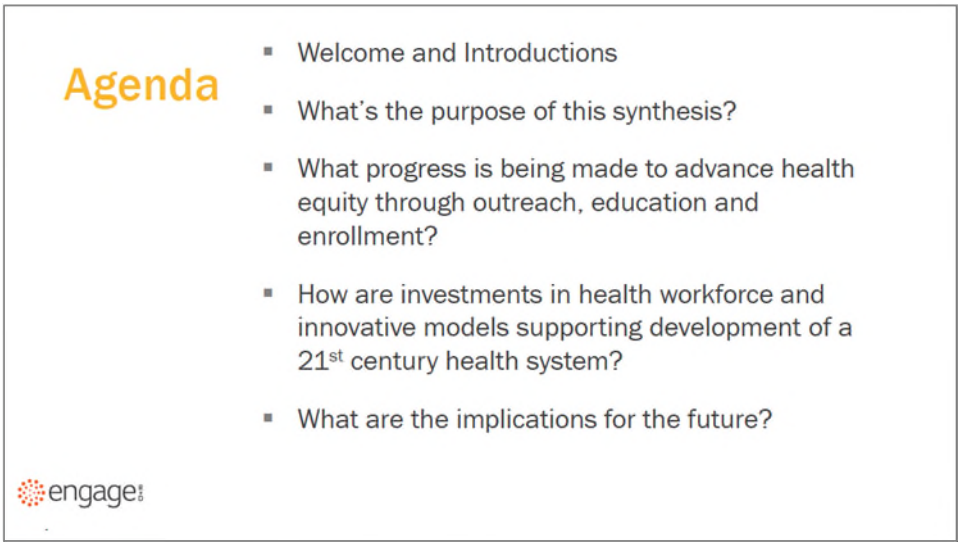
	NEVER	RARELY	SOMETIMES	FREQUENTLY	ALWAYS
WEB MEETINGS	1%	9%	34%	48%	7%
WEBINARS	3%	17%	34%	37%	9%

(Because agendas are usually not as essential in webcasts, we did not survey respondents for this category.)

AGENDAS ARE PROVIDED SOMETIMES (OR LESS OFTEN) **44%** to **54%** OF THE TIME.

RECOMMENDATIONS | DISPLAY AN AGENDA…

#4 STRUCTURE



RECOMMENDATIONS | …OR OBJECTIVES #4 STRUCTURE

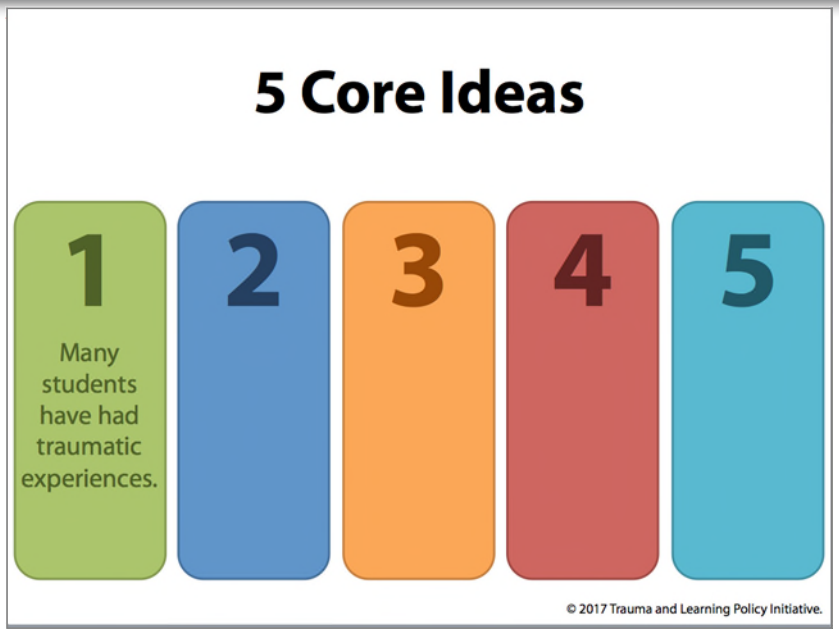
Learning Objectives

After this session, participants will:

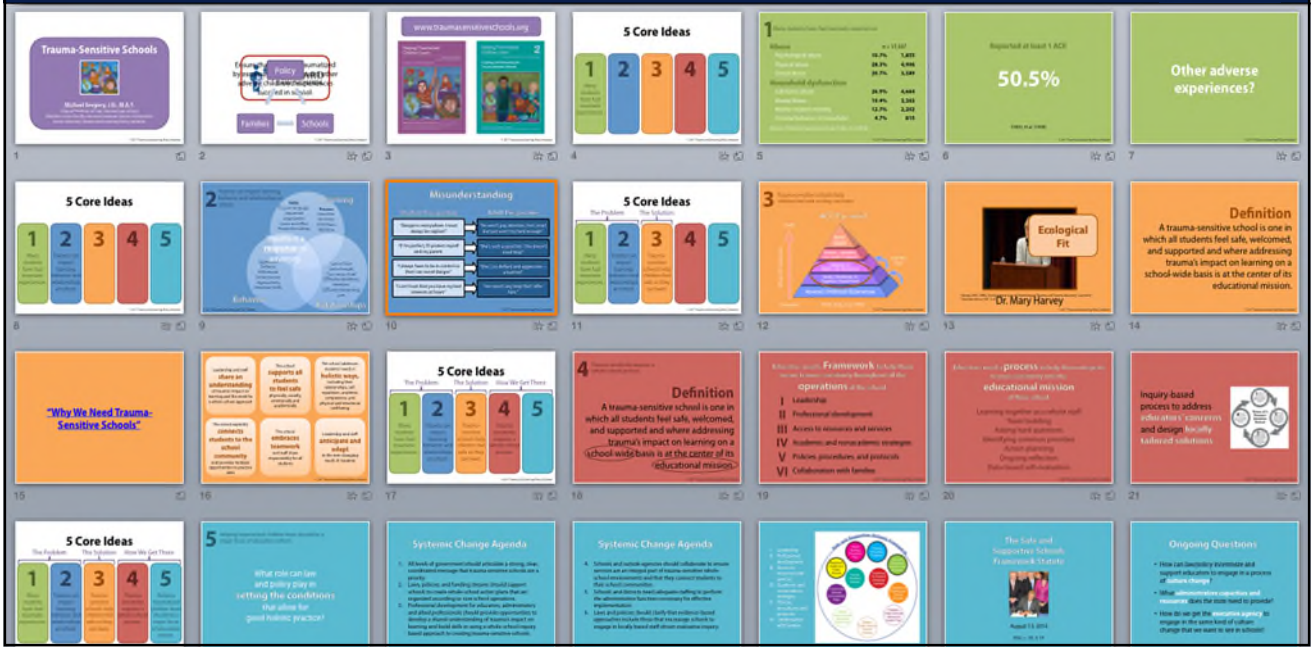
- Describe how concepts of teamwork are embedded in the PM within clinical casework and organizational performance
- Describe skills to work across differences to improve both clinical and organizational team performance
- Describe facilitation skills to improve both clinical and organizational team meetings
- Describe skills as a meeting participant that helps the team stay focused and productive

RECOMMENDATIONS | AGENDAS TRACKING PROGRESS #4 STRUCTURE

RECOMMENDATIONS | OVERALL DESIGN CAN HELP #4 STRUCTURE



RECOMMENDATIONS | OVERALL DESIGN CAN HELP #4 STRUCTURE



TAKEAWAY #5 LENGTH & FREQUENCY

Shorter and fewer, please.

The mental and physical wear and tear of meeting online coupled with the increase in meetings per day argue for shorter durations and fewer meetings.

YOUR RESPONSES

#5 LENGTH & FREQUENCY

the goodman center

"How to Develop and Lead Successful Virtual Sessions"

Please answer the questions below so you can compare your responses with our survey.

What makes a work-related videoconference a *positive* experience for you?

#1	
#2	
#3	

What makes a work-related videoconference a *negative* experience for you?

#1	
#2	
#3	

Questions about length and frequency:

How many hours per week (on average) do you spend in videoconferences?	
What's the ideal length of time for a web meeting (e.g., team meeting)?	
What's the ideal length of time for a webinar (e.g., presentation or training)?	
What's the ideal length of time for a webcast (e.g., large-scale gathering)?	
How long should any online convening continue without a break?	

Questions about using platform tools:

In general, do you prefer to have your camera on or off?	
In general, do you prefer asking questions orally or in the chat box?	
In general, do you see accessibility tools (e.g., captioning, translation) used during your videoconferences?	
In general, do you read chat box comments?	

Questions for videoconference leaders or facilitators (Yes or No):

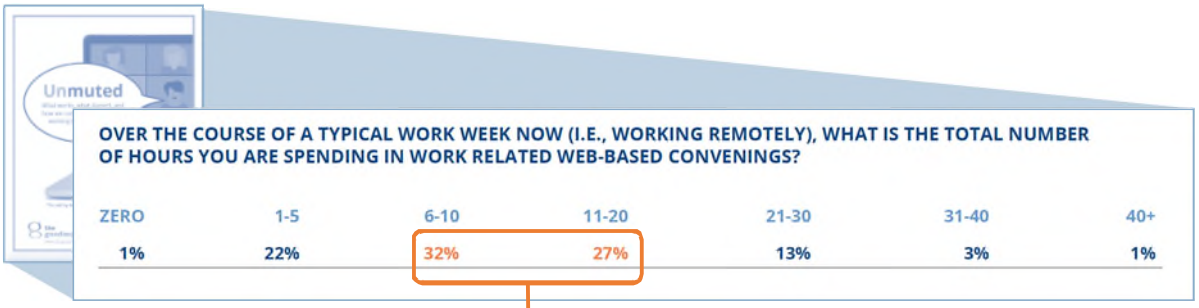
Have you had any training in how to lead or facilitate videoconferences?	
Do you review how to use the platform's tools at the start of your videoconference?	
Do you usually provide an agenda before or during the videoconference?	

Whether you are leading or participating, what are creative ways that you've seen videoconferences keep participants engaged?

Whether you are leading or participating, what have you seen or done to create a more inclusive space?

SURVEY DATA

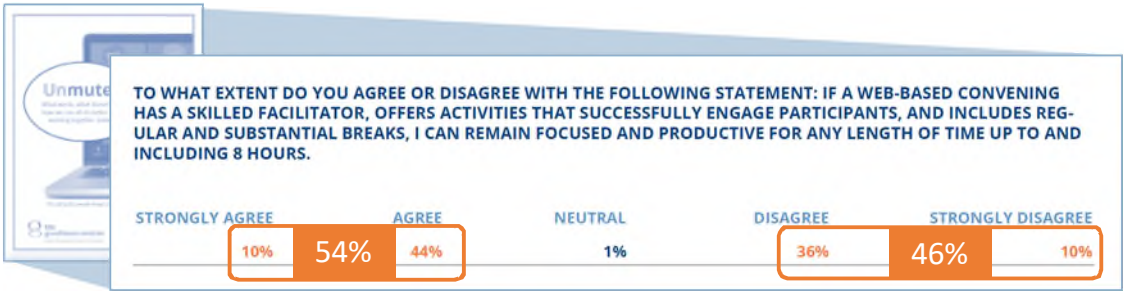
#5 LENGTH & FREQUENCY



59%
SPEND 6-20 HRS.
ONLINE PER WEEK

SURVEY DATA

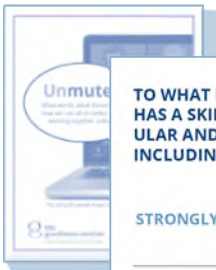
#5 LENGTH & FREQUENCY



CLOSE TO EVEN SPLIT ON QUESTION OF
REMAINING FOCUSED AND PRODUCTIVE
UP TO 8 HOURS ONLINE.

SURVEY DATA

#5 LENGTH & FREQUENCY



TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENT: IF A WEB-BASED CONVENING HAS A SKILLED FACILITATOR, OFFERS ACTIVITIES THAT SUCCESSFULLY ENGAGE PARTICIPANTS, AND INCLUDES REGULAR AND SUBSTANTIAL BREAKS, I CAN REMAIN FOCUSED AND PRODUCTIVE FOR ANY LENGTH OF TIME UP TO AND INCLUDING 8 HOURS.

STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE
10%	44%	1%	36%	10%

46%

IF YOU DISAGREED OR STRONGLY DISAGREED WITH THE STATEMENT ABOVE, WHAT IS THE TOTAL NUMBER OF HOURS YOU CAN PARTICIPATE IN WEB-BASED CONVENINGS IN A SINGLE DAY *AND STILL FEEL FOCUSED AND PRODUCTIVE*?

1	2	3	4	5	6	7
3%	20%	32%	35%	7%	2%	.3%

87% PREFER **2-4 HRS./DAY** MAXIMUM

SURVEY DATA

#5 LENGTH & FREQUENCY

Tired of Zoom calls? So is Citigroup's chief executive.

March 25, 2021, 6:30 a.m. ET

Complaints of "Zoom fatigue" have emerged across industries and classrooms in the past year, as people confined to working from home faced schedules packed with virtual meetings and often followed up by long video catch-ups with friends, reports Anna Schaverien of The New York Times.

But Citigroup, one of the world's largest banks, is trying to start a new end-of-week tradition meant to combat that fatigue: Zoom-free Fridays.

The bank's new chief executive, Jane Fraser, announced the plan in a memo sent to employees on Monday. Recognizing that workers have spent inordinate amounts of the past 12 months staring at video calls, Citi is encouraging its employees to take a step back from Zoom and other videoconferencing platforms for one day a week, she said.

Jane Fraser in 2019. "The blurring of lines between home and work and the relentlessness of the pandemic workday have taken a toll on our well-being," she told Citigroup employees. Erin Scott/Reuters

SURVEY DATA

#5 LENGTH & FREQUENCY

WHAT AMOUNT OF TIME DO YOU FEEL WOULD BE THE IDEAL LENGTH FOR A:

WEB MEETING	
30 MINUTES OR LESS	22%
31-60 MINUTES	67%
61-90 MINUTES	10%
91-120 MINUTES	1%
2-3 HOURS	-
4 HOURS OR MORE	-

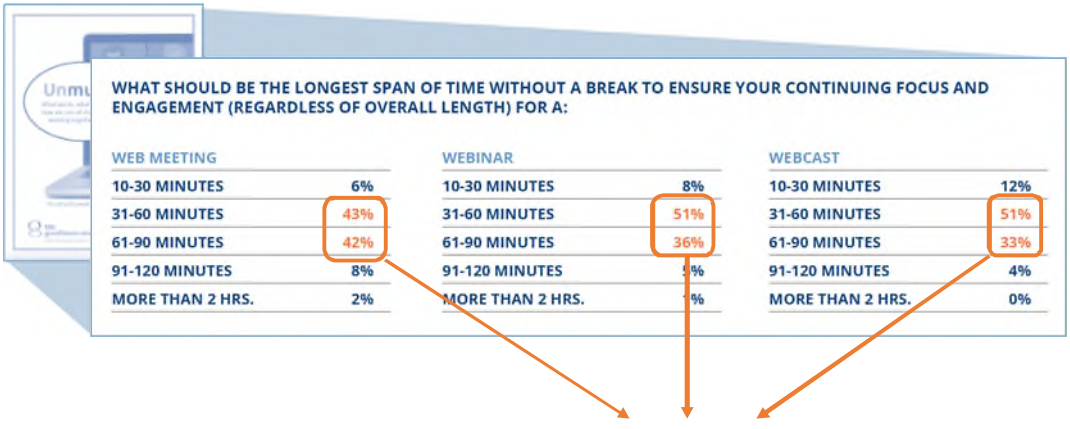
WEBINAR	
60 MINUTES OR LESS	66%
61-90 MINUTES	30%
91-120 MINUTES	3%
2-3 HOURS	1%
4 HOUR OR MORE	-

WEBCAST	
60 MINUTES OR LESS	68%
61-90 MINUTES	25%
91-120 MINUTES	4%
2-3 HOURS	2%
4-5 HOURS	.5%
6 HOURS OR MORE	0%

PREFERRED LENGTH REGARDLESS OF FORMAT:
60 MINUTES (OR LESS)

SURVEY DATA

#5 LENGTH & FREQUENCY



WHAT SHOULD BE THE LONGEST SPAN OF TIME WITHOUT A BREAK TO ENSURE YOUR CONTINUING FOCUS AND ENGAGEMENT (REGARDLESS OF OVERALL LENGTH) FOR A:

WEB MEETING	
10-30 MINUTES	6%
31-60 MINUTES	43%
61-90 MINUTES	42%
91-120 MINUTES	8%
MORE THAN 2 HRS.	2%

WEBINAR	
10-30 MINUTES	8%
31-60 MINUTES	51%
61-90 MINUTES	36%
91-120 MINUTES	[illegible]%
MORE THAN 2 HRS.	[illegible]%

WEBCAST	
10-30 MINUTES	12%
31-60 MINUTES	51%
61-90 MINUTES	33%
91-120 MINUTES	4%
MORE THAN 2 HRS.	0%

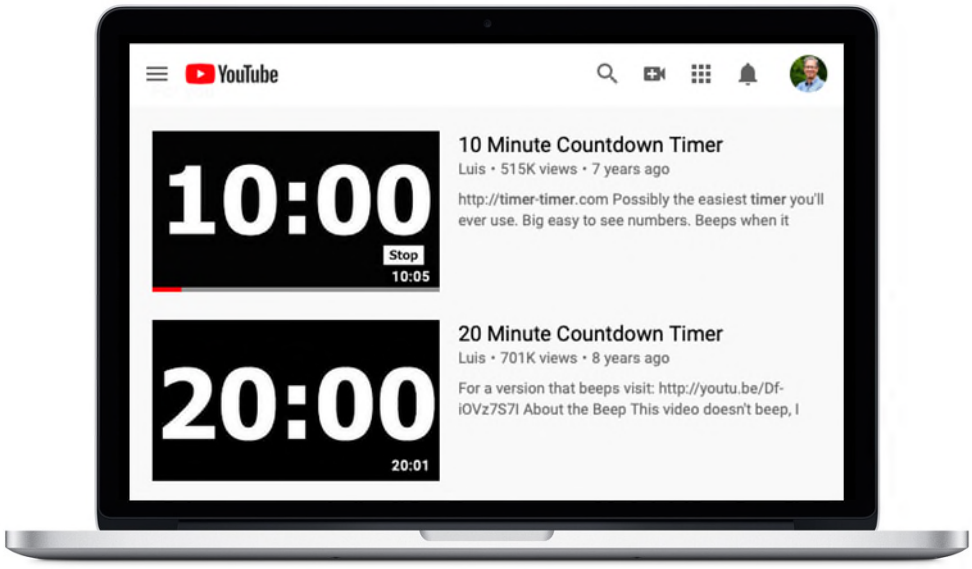
PREFERRED TIME SPAN UNTIL A BREAK:
30-90 MINUTES

10:00

Just arriving (or rejoining)? We're on a 10-minute break. Please check in with Kirsten via the chat box if you have a question.

SURVEY DATA

#5 LENGTH & FREQUENCY



RECOMMENDATIONS

#5 LENGTH & FREQUENCY

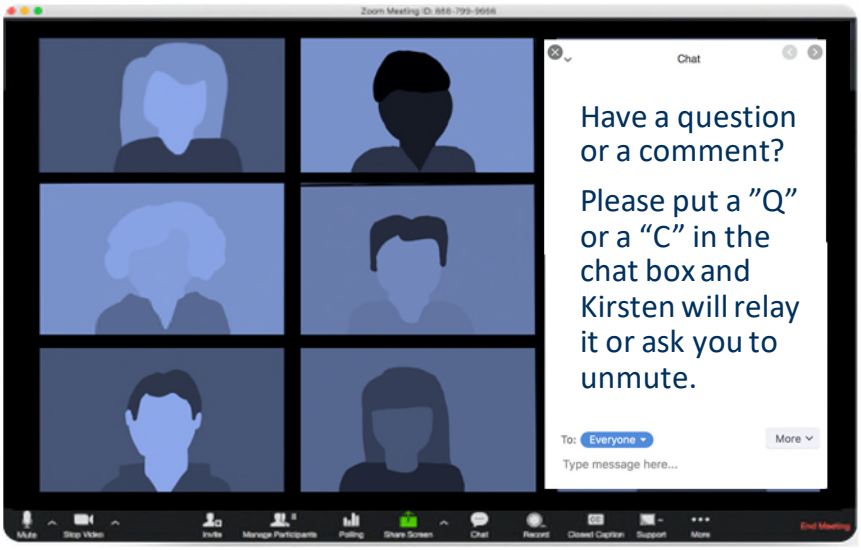
4 hour per day maximum for online convenings.

Limit convenings to **1 hour** if possible; build in breaks if longer than 1 hour.

Schedule breaks **every 30-45 minutes** if possible, but definitely no further apart than 90 minutes.

QUESTIONS & COMMENTS

?



!

TAKEAWAY #6 PREFERRED PLATFORMS

It's Zoom's world. We're just working in it.

Microsoft, Google, Cisco and other big tech players are becoming more competitive every day, but for now, Zoom is the top choice for all categories of online convenings.

SURVEY DATA

#6 PREFERRED PLATFORMS

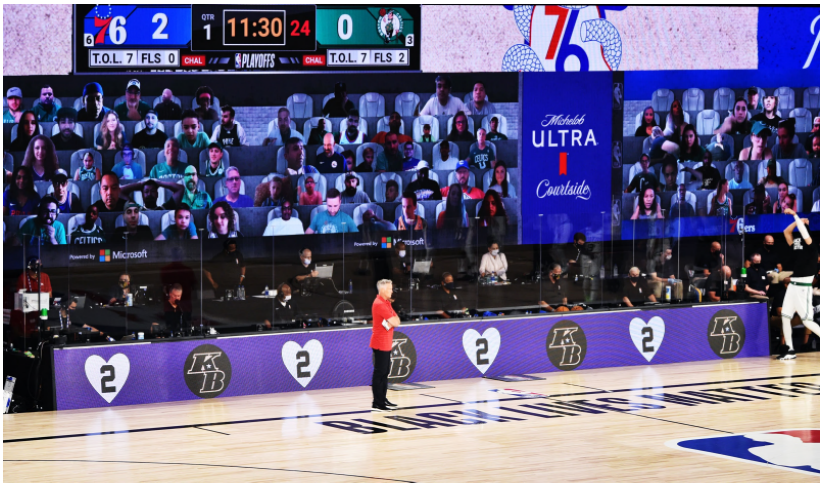
CATEGORY	PLATFORMS (LISTED IN ORDER OF USAGE)	USE MOST OFTEN	SATISFACTION (1-5 SCALE)
ALL CONVENINGS	ZOOM	97%	4.02
	MICROSOFT TEAMS	43%	3.41
	GOTOWEBINAR	36%	3.40
	WEBEX	31%	3.30
	GOOGLE MEET	29%	3.18
WEB MEETINGS	ZOOM	91%	4.18
	MICROSOFT TEAMS	34%	3.67
	GOOGLE MEET	19%	3.48
	WEBEX	15%	3.54
	GOTOWEBINAR	12%	3.64
WEBINARS	ZOOM	86%	3.95
	GOTOWEBINAR	48%	3.55
	WEBEX	34%	3.38
	MICROSOFT TEAMS	12%	3.46
	FACEBOOK LIVE	7%	3.12
WEBCASTS	ZOOM	75%	3.83
	YOUTUBE	34%	3.65
	GOTOWEBINAR	33%	3.44
	WEBEX	28%	3.46
	FACEBOOK LIVE	22%	3.09

ZOOM
MOST USED
AND HIGHEST
RATED

RECOMMENDATION

#6 PREFERRED PLATFORMS

Zoom, but…



Microsoft Teams "Together" Mode

TAKEAWAY #7 PERSONAL VIDEO FEEDS

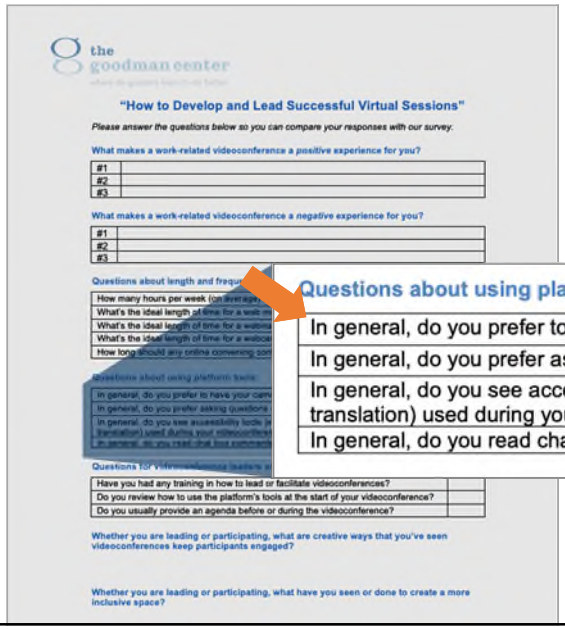
Q. Should I turn my camera on or off?

A. Yes!

The kind and size of your online convening can provide useful guidelines, but whenever possible, let your participants decide for themselves.

YOUR RESPONSES

#7 PERSONAL VIDEO FEEDS



the goodman center

"How to Develop and Lead Successful Virtual Sessions"

Please answer the questions below so you can compare your responses with our survey.

What makes a work-related videoconference a *positive* experience for you?

#1	
#2	
#3	

What makes a work-related videoconference a *negative* experience for you?

#1	
#2	
#3	

Questions about length and frequ

How many hours per week (on average)	
What's the ideal length of time for a work m	
What's the ideal length of time for a webina	
What's the ideal length of time for a webcas	
How long should any online convening last	

Questions about using platform tools:

In general, do you prefer to have your camera on or off?	
In general, do you prefer asking questions out loud or submitting via chat?	
In general, do you see accessibility tools (e.g., closed captions, language translation) used during your videoconferences? (Yes or No)	
In general, do you read chat box comments as they appear? (Yes or No)	

Questions for videoconference leaders a

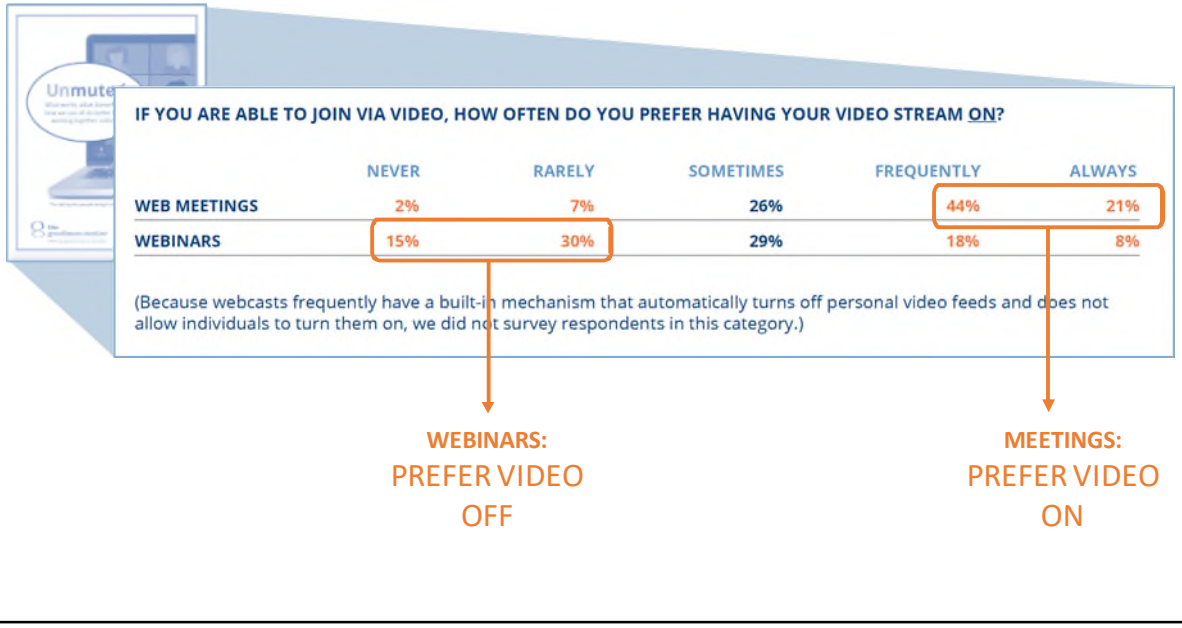
Have you had any training in how to lead or facilitate videoconferences?	
Do you review how to use the platform's tools at the start of your videoconference?	
Do you usually provide an agenda before or during the videoconference?	

Whether you are leading or participating, what are creative ways that you've seen videoconferences keep participants engaged?

Whether you are leading or participating, what have you seen or done to create a more inclusive space?

SURVEY DATA

#7 PERSONAL VIDEO FEEDS



IF YOU ARE ABLE TO JOIN VIA VIDEO, HOW OFTEN DO YOU PREFER HAVING YOUR VIDEO STREAM ON?

	NEVER	RARELY	SOMETIMES	FREQUENTLY	ALWAYS
WEB MEETINGS	2%	7%	26%	44%	21%
WEBINARS	15%	30%	29%	18%	8%

(Because webcasts frequently have a built-in mechanism that automatically turns off personal video feeds and does not allow individuals to turn them on, we did not survey respondents in this category.)

WEBINARS: PREFER VIDEO OFF

MEETINGS: PREFER VIDEO ON

RECOMMENDATIONS

#7 PERSONAL VIDEO FEEDS

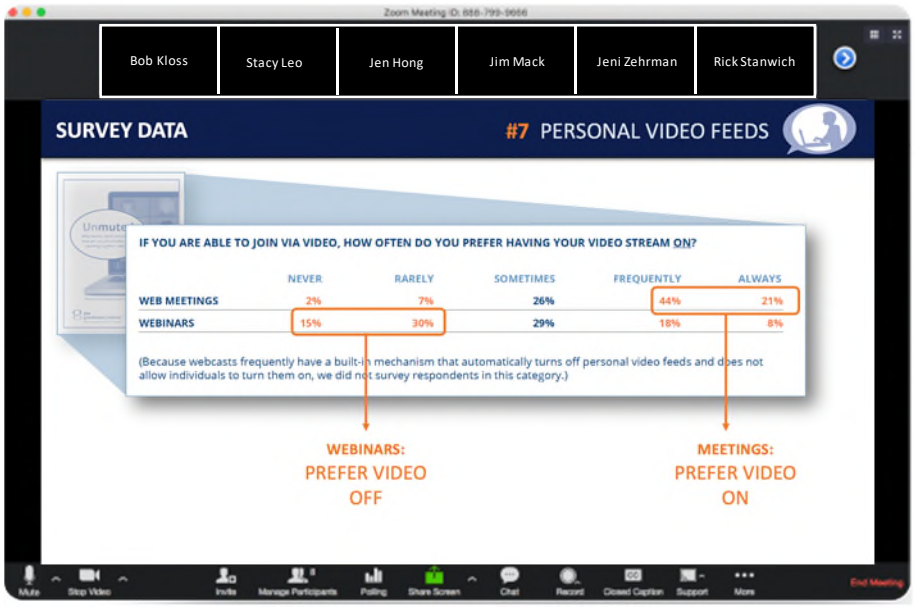
ON for intro's

RECOMMENDATIONS

#7 PERSONAL VIDEO FEEDS

ON for intro's

OFF during presentation



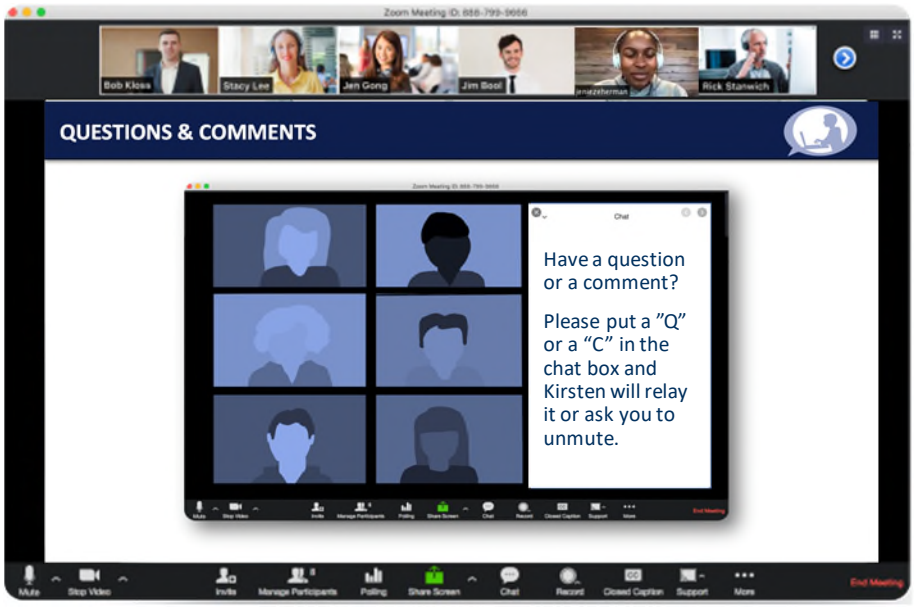
RECOMMENDATIONS

#7 PERSONAL VIDEO FEEDS

ON for intro's

OFF during presentation

ON for Q&A or comments



RECOMMENDATIONS

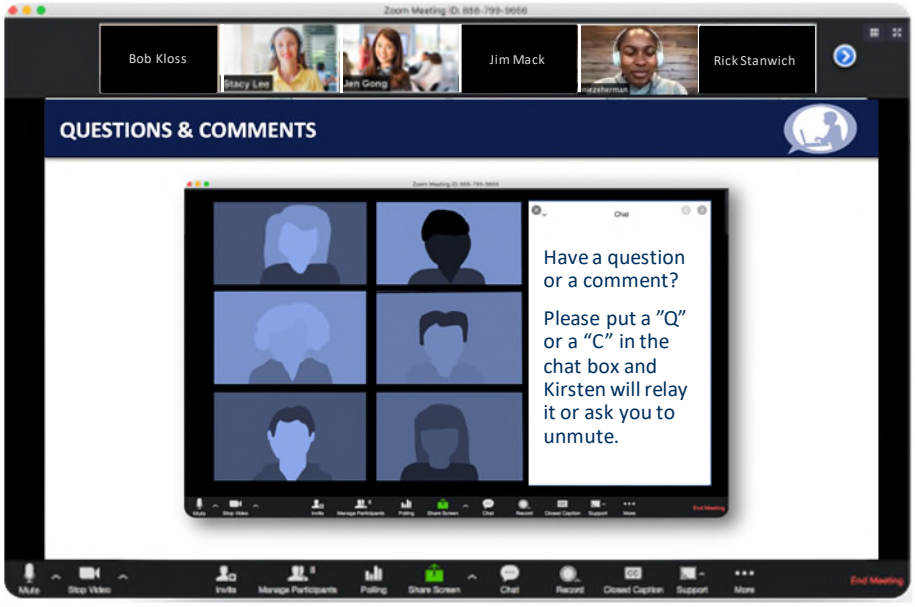
#7 PERSONAL VIDEO FEEDS

ON for intro's

OFF during presentation

ON for Q&A or comments

ALWAYS give participants the option to choose for themselves



RECOMMENDATIONS

#7 PERSONAL VIDEO FEEDS

"My boss makes us keep our video on. I'm on video 5 to 7 hours a day. It is exhausting. I hate looking at myself all day and fake smiling during Zoom meetings. My head hurts every day. **Please make it stop."**

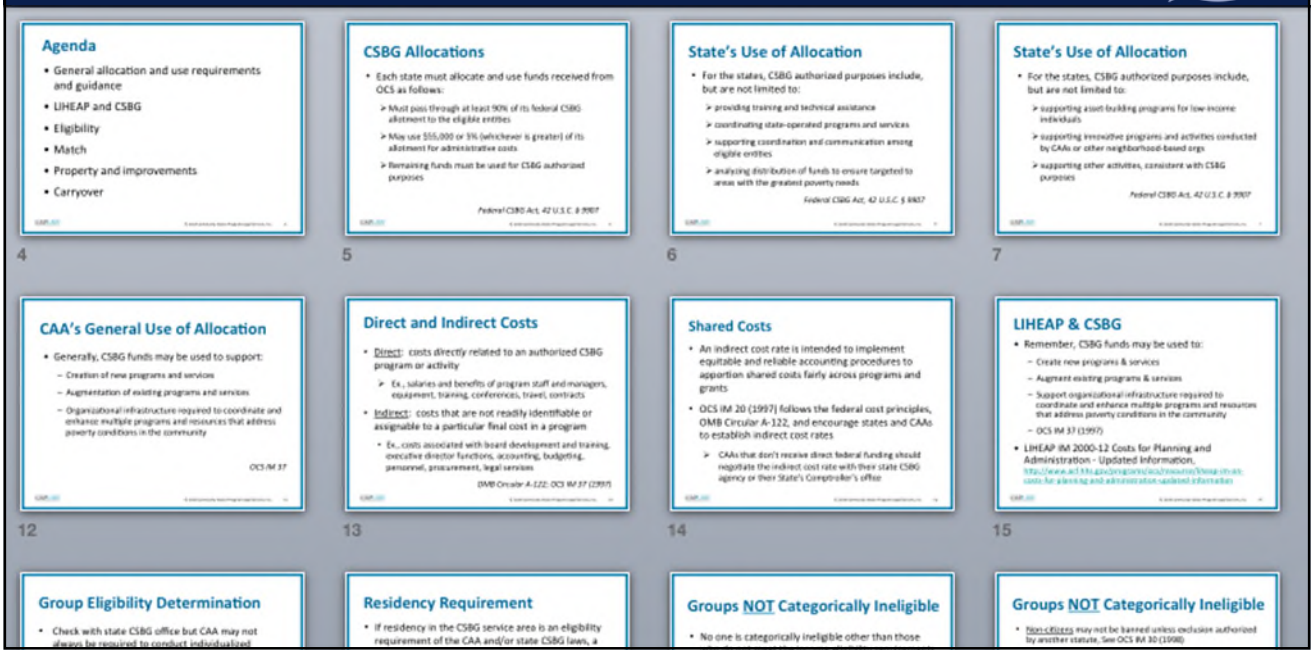
TAKEAWAY #8 SLIDES

Less text, more action, and always build.

Design techniques that make in-person presentations more eye-catching are essential in an environment where it's easy to look away.

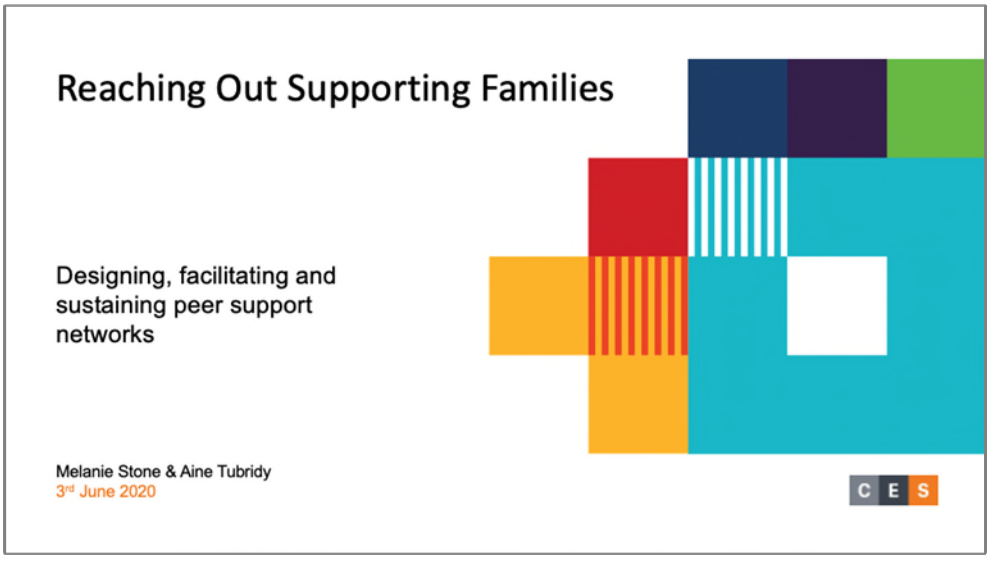
RECOMMENDATIONS | NOT THIS

#8 SLIDES



RECOMMENDATIONS | TWO SETS

#8 SLIDES



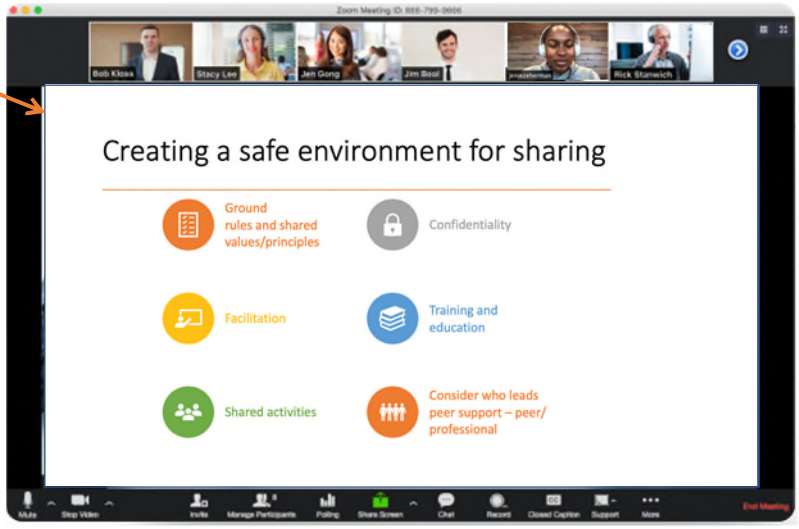
RECOMMENDATIONS | TWO SETS

#8 SLIDES

RECOMMENDATIONS | TWO SETS

#8 SLIDES

SLIDE



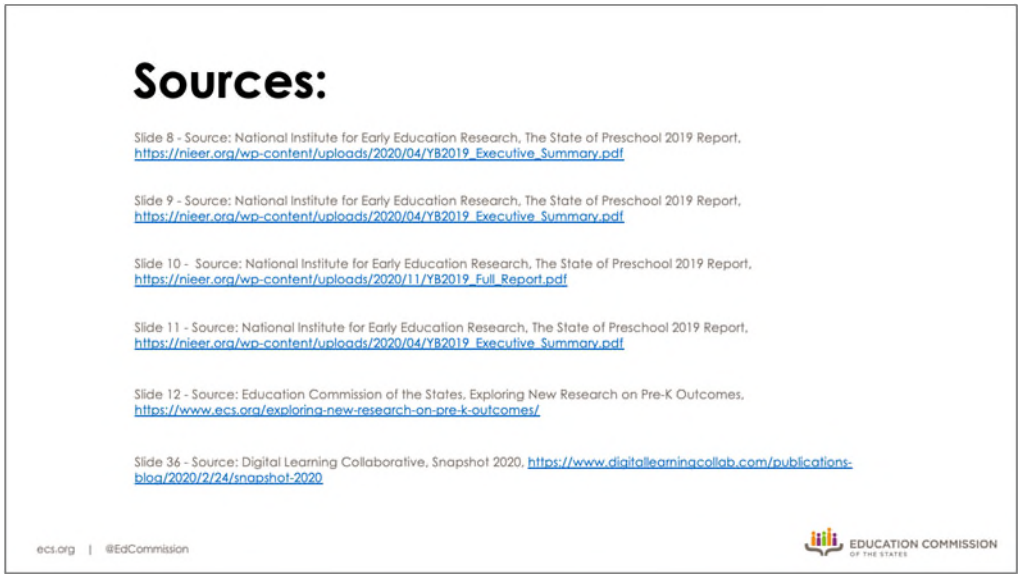
HANDOUT

RECOMMENDATIONS | LESS IS MORE

#8 SLIDES

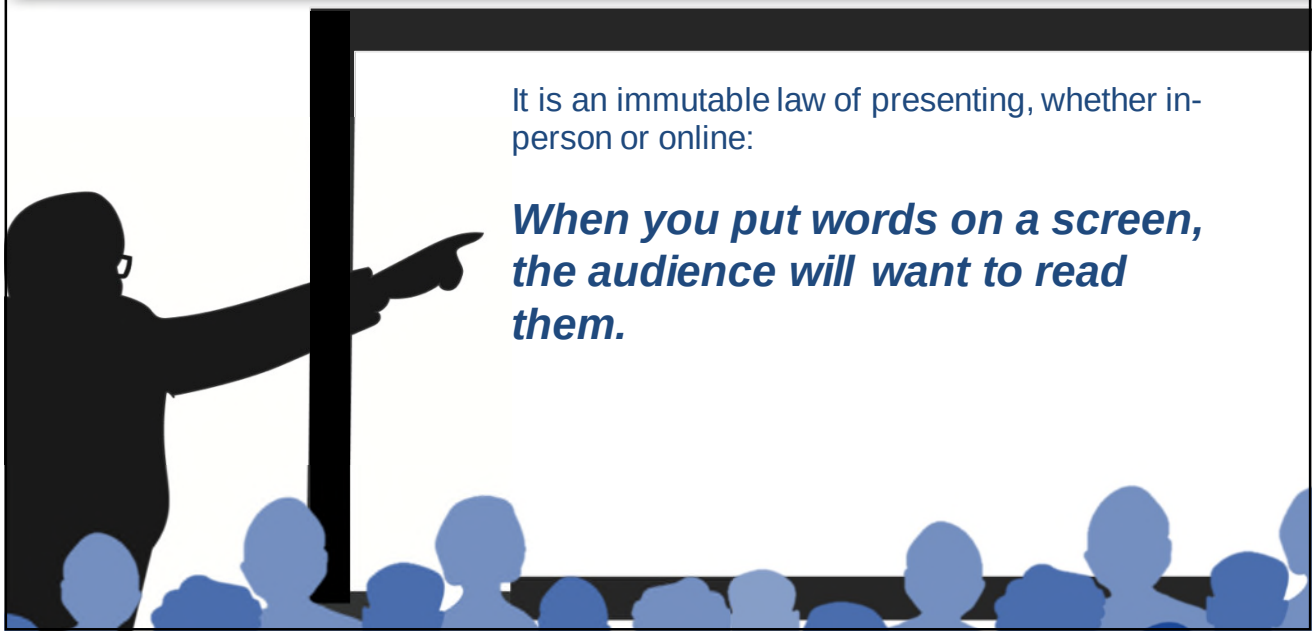
RECOMMENDATIONS | LESS IS MORE

#8 SLIDES



RECOMMENDATIONS | LET THEM READ

#8 SLIDES



It is an immutable law of presenting, whether in-person or online:

When you put words on a screen, the audience will want to read them.

RECOMMENDATIONS | LET THEM READ

#8 SLIDES

Sometimes you will want to have a lot of text on a slide. For example, when you want to include a lengthy **direct quote**. In those cases, stop and let the participants read the slide for themselves. The silence will get their attention (which is a good thing), and if you read it to them, you'll only be a nuisance because they're already trying to read it for themselves.

RECOMMENDATIONS | STYLE = SUBSTANCE **#8** SLIDES

Our Vision

EDUCATORS FOR FAIR CONSIDERATION

We envision an America where all young people can pursue and complete an education with confidence and without constraint.

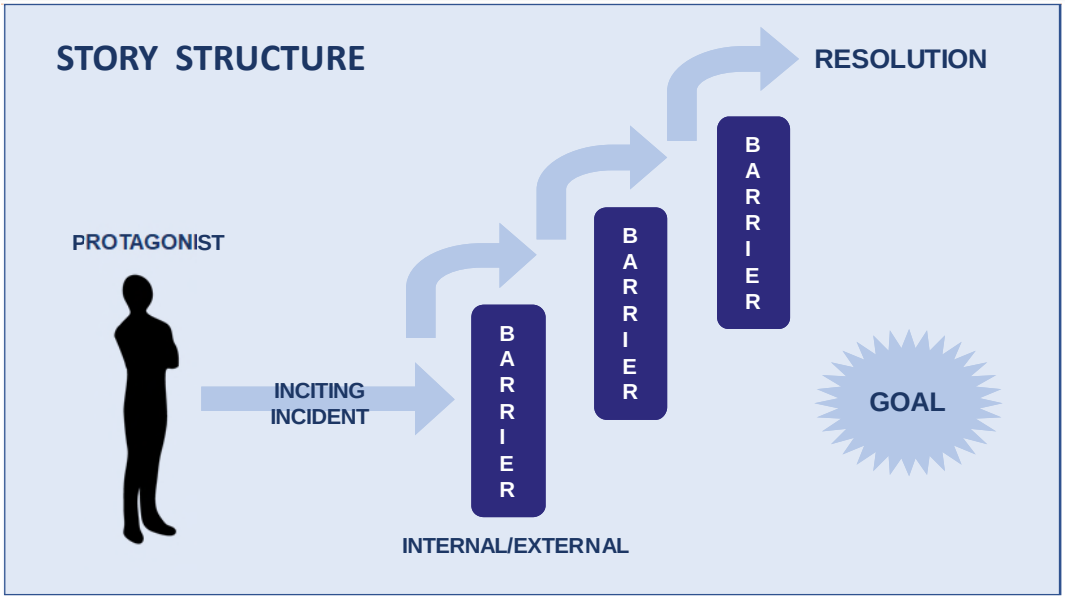
RECOMMENDATIONS | STYLE = SUBSTANCE **#8** SLIDES

RECOMMENDATIONS | ALWAYS BUILD #8 SLIDES

STRUCTURE

- We meet the protagonist and see his/her "world in balance."
- "Inciting Incident" gives the protagonist a goal.
- Protagonist runs into barriers in pursuit of the goal.
- Protagonist eventually overcomes all barriers (or succumbs.)
- Resolution.

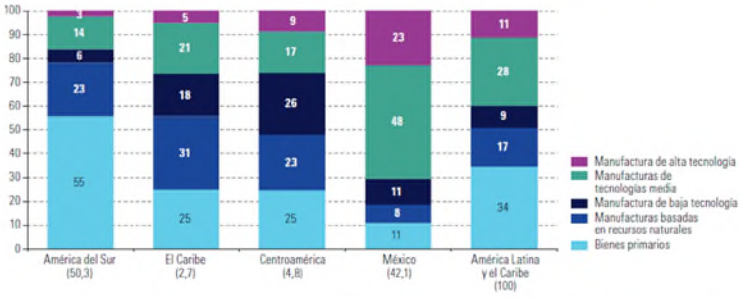
RECOMMENDATIONS | ALWAYS BUILD #8 SLIDES



RECOMMENDATIONS | ALWAYS BUILD

#8 SLIDES

Latino América concentra más de la mitad del valor de sus exportaciones en productos primarios y manufacturas basadas en recursos naturales.



Fuente: Comisión Económica para América Latina y el Caribe (CEPAL), sobre la base de información de la Base de Datos Estadísticos de las Naciones Unidas sobre el Comercio de Productos Básicos (COMTRADE).

Natural Resource Governance Institute

RECOMMENDATIONS | ALWAYS BUILD

#8 SLIDES

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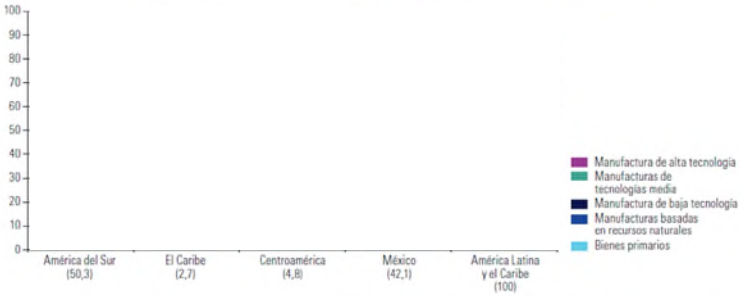

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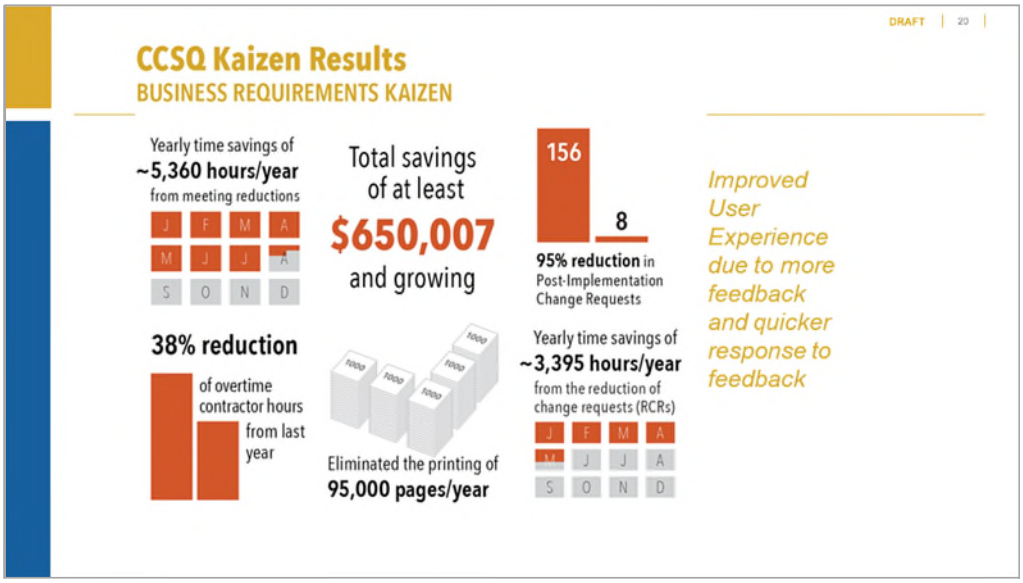
Natural Resource Governance Institute

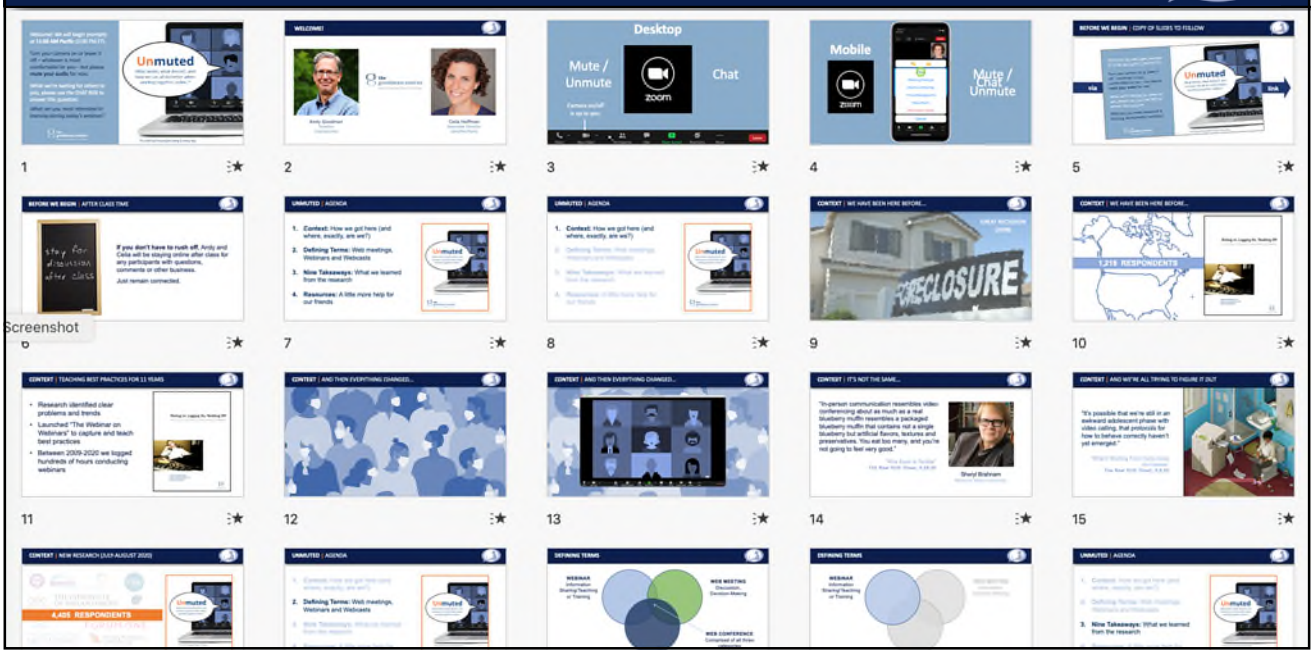
RECOMMENDATIONS | ALWAYS BUILD **#8** SLIDES



RECOMMENDATIONS | ALWAYS BUILD **#8** SLIDES

RECOMMENDATIONS | KEEP IT MOVING

#8 SLIDES



Screenshot

RECOMMENDATIONS | KEEP IT MOVING

#8 SLIDES

Screenshot

2 hours = 150+ slides

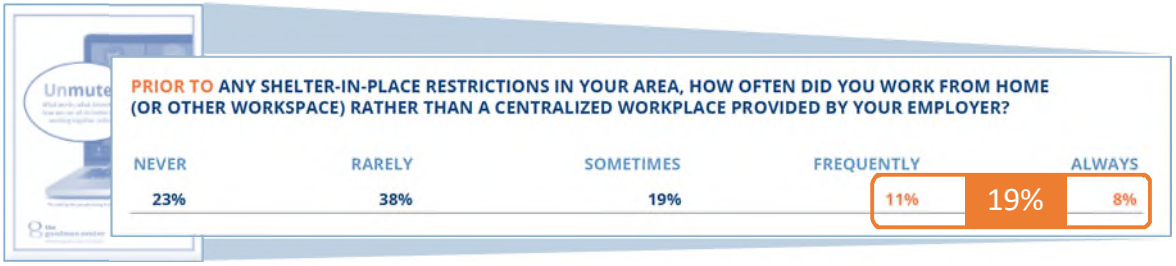
TAKEAWAY #9 LONG-TERM TRENDS

It ain't over when it's over.

Post pandemic, working remotely will play a significantly larger role in how organizations function than it did prior to the pandemic.

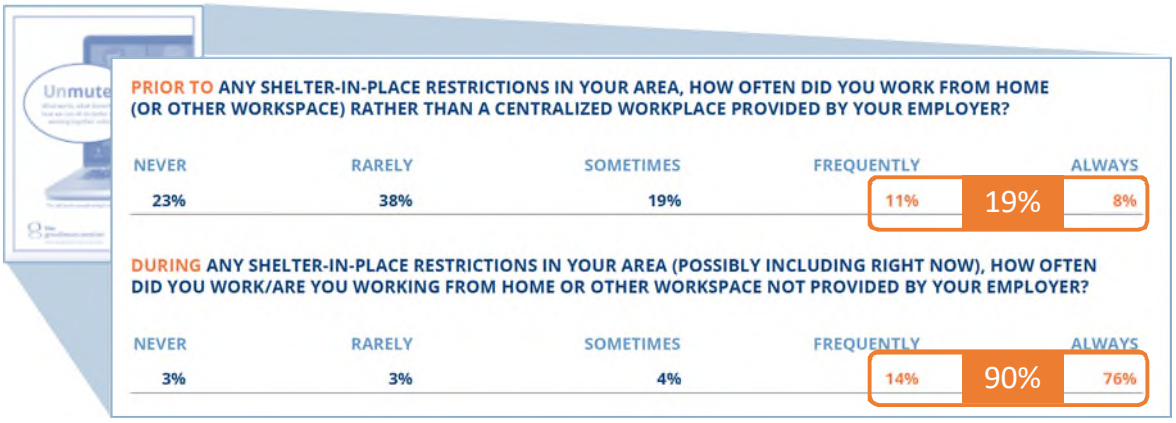
SURVEY DATA

#9 LONG-TERM TRENDS



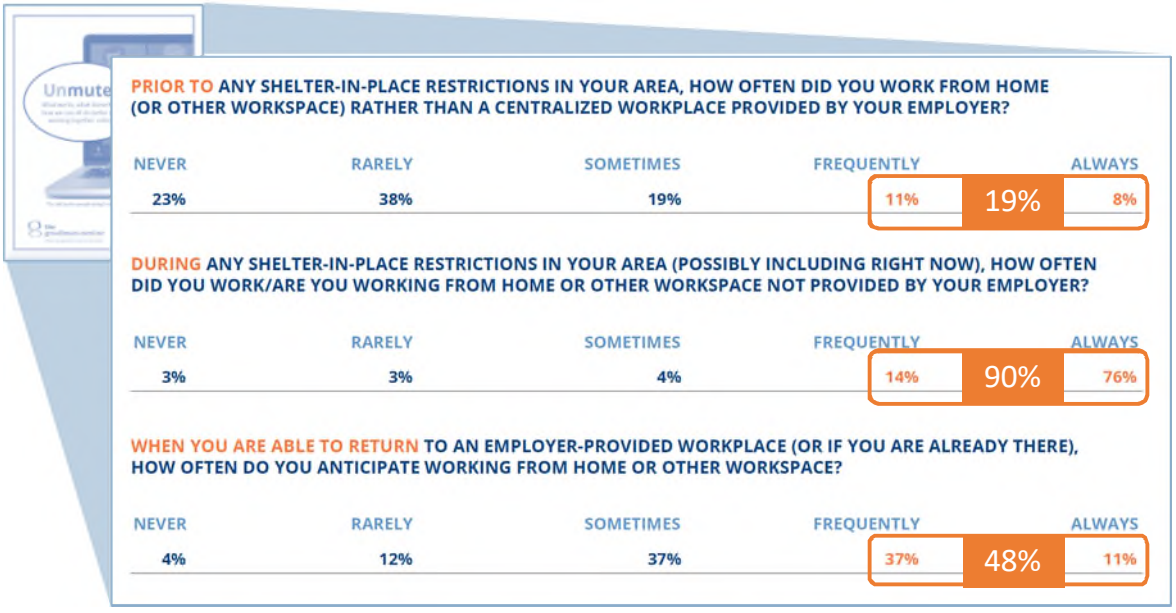
SURVEY DATA

#9 LONG-TERM TRENDS



SURVEY DATA

#9 LONG-TERM TRENDS



SURVEY DATA

#9 LONG-TERM TRENDS

PLEASE RATE YOUR HOME OR OTHER WORKSPACE ON HOW CONDUCIVE IT IS TO GETTING WORK DONE (E.G., AMOUNT OF SPACE, NOISE LEVEL, POTENTIAL DISTRACTIONS) WHERE 1 REPRESENTS NOT CONDUCIVE AT ALL AND 5 REPRESENTS VERY CONDUCIVE.

1	2	3	4	5
2%	7%	21%	36%	34%

70%

4-5 RANGE

SURVEY DATA

#9 LONG-TERM TRENDS

PLEASE RATE THE AVAILABILITY OF RESOURCES IN YOUR HOME OR OTHER WORKSPACE (E.G., COMPUTER, PRINTER, INTERNET CONNECTION, ETC.) WHERE 1 REPRESENTS LITTLE OR NO AVAILABILITY AND 5 REPRESENTS COMPLETE AVAILABILITY.

1	2	3	4	5
1%	5%	18%	36%	41%

77%

4-5 RANGE

SURVEY DATA

#9 LONG-TERM TRENDS

WHEN WORKING FROM HOME OR OTHER WORKSPACE NOT PROVIDED BY YOUR EMPLOYER, HOW OFTEN DOES THE SPEED OF YOUR INTERNET CONNECTION NEGATIVELY AFFECT YOUR EXPERIENCE DURING WEB-BASED CONVENINGS?

NEVER	RARELY	SOMETIMES	FREQUENTLY	ALWAYS
13%	41%	35%	10%	1%

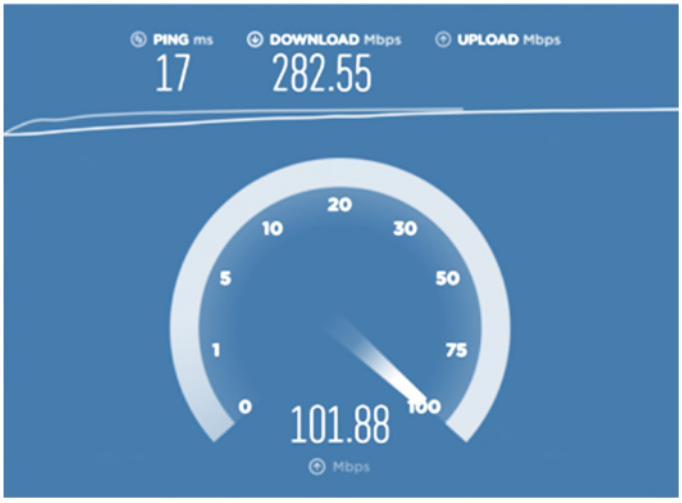
46%

SOMETIMES OR MORE

RECOMMENDATION

#9 LONG-TERM TRENDS

Ensure team members have sufficient Internet speeds to participate fully in online convenings.

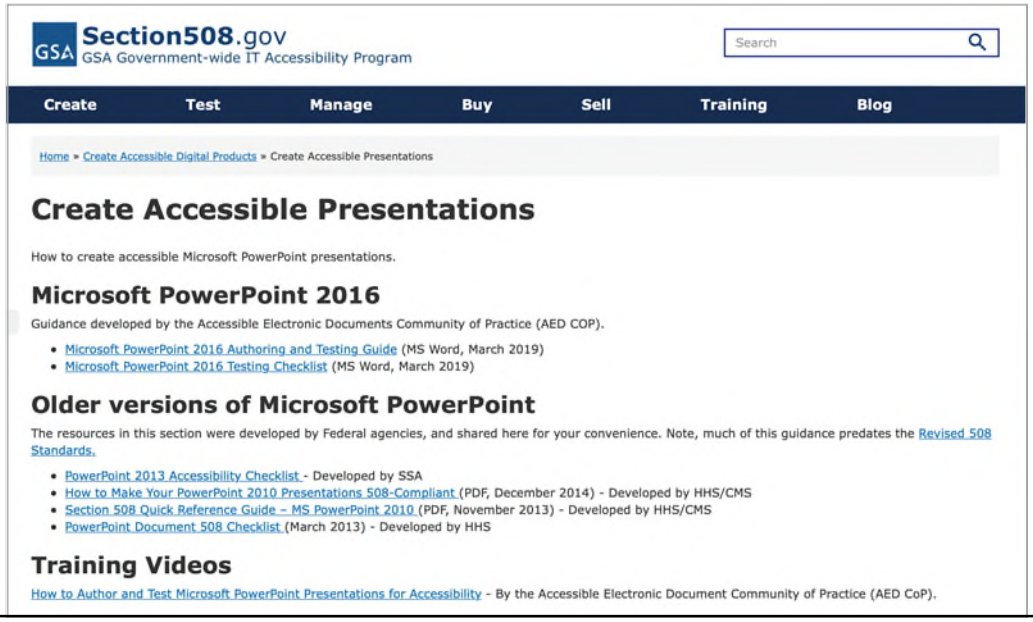


www.speedtest.net

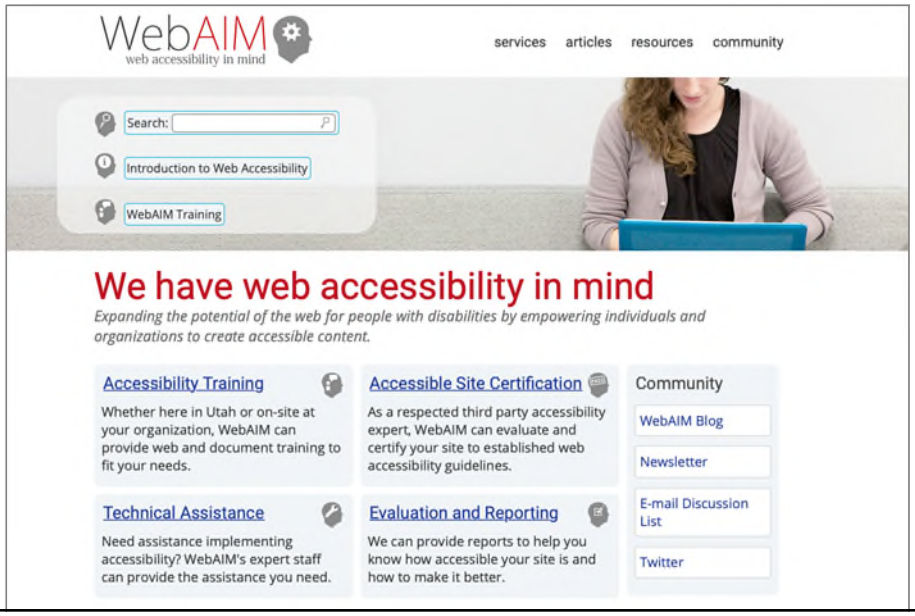
SUCCESSFUL VIRTUAL SESSIONS | AGENDA

1. **Context:** How we got here (and where, exactly, are we?)
2. **Defining Terms:** All virtual sessions are not the same
3. **Nine Takeaways:** What we learned from the research
4. **Resources:** A little more help for our friends

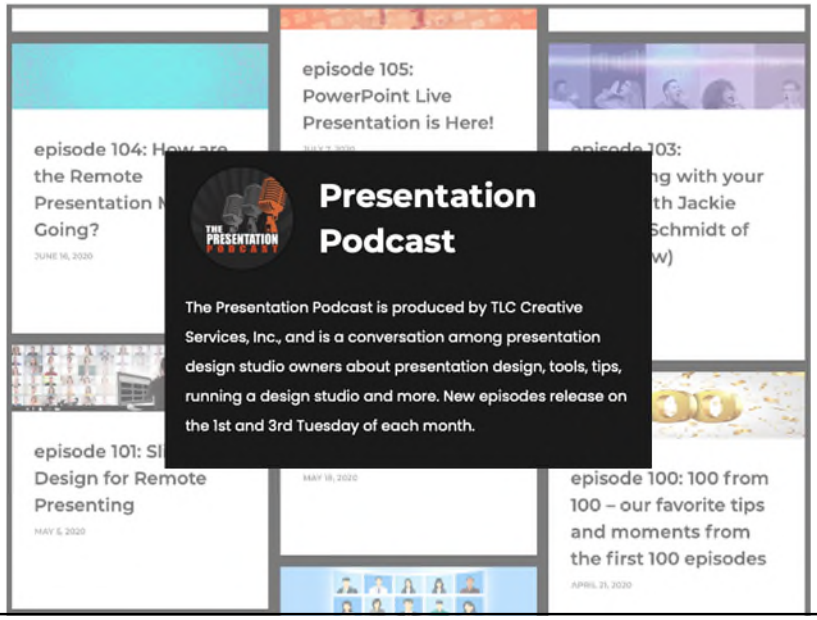
RESOURCES | ACCESSIBILITY GUIDELINES (section508.gov)



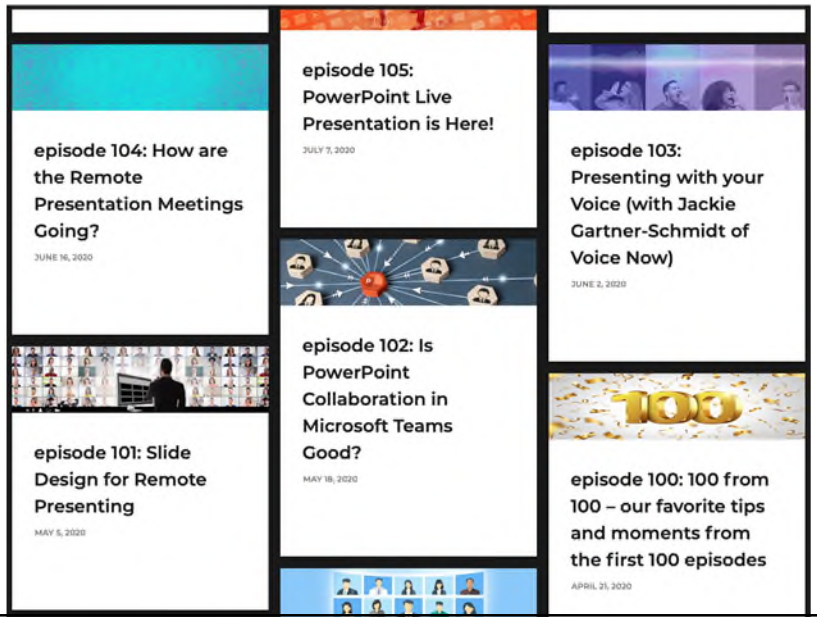
RESOURCES | ACCESSIBILITY GUIDELINES (webaim.org)



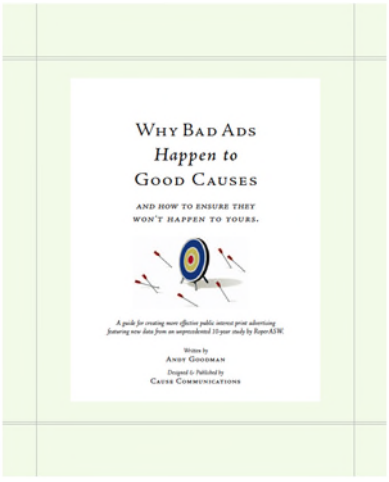
RESOURCES | PRESENTATIONS (ThePresentationPodcast.com)

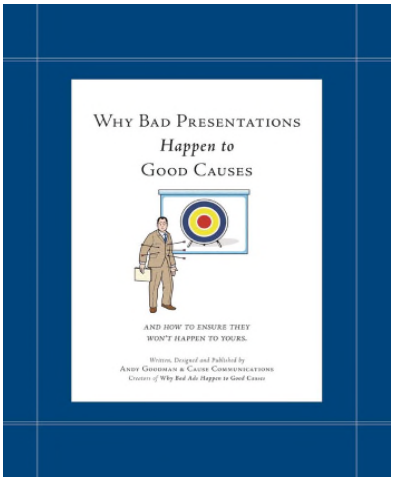


RESOURCES | PRESENTATIONS (ThePresentationPodcast.com)



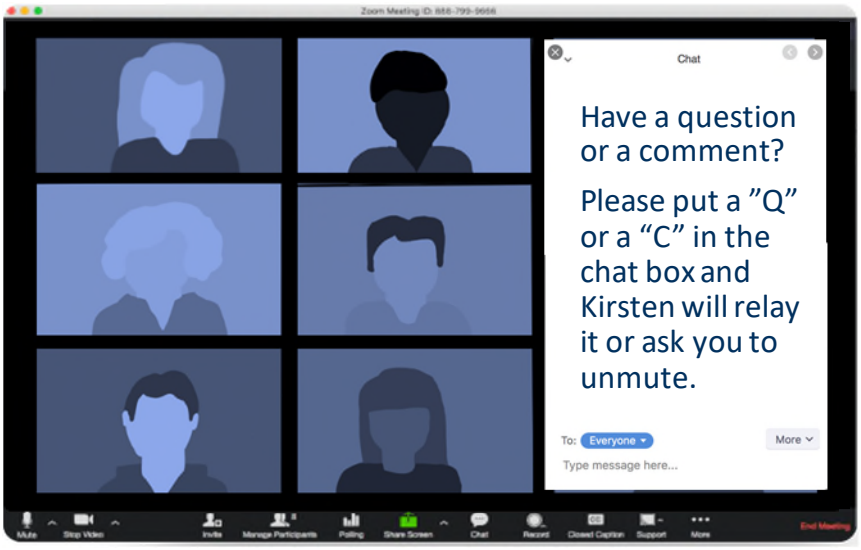
RESOURCES | BOOKS AND REPORT (thegoodmancenter.com)





QUESTIONS & COMMENTS

?



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THEGOODMANCENTER.COM | NEWSLETTER

TWITTER| @GoodmanCenter

WEBINARS| thegoodmancenter.com

FINAL THOUGHTS

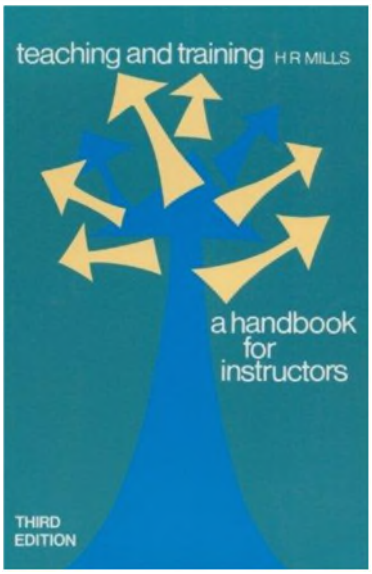
FINAL THOUGHTS| "We are all Robert Kelly now."

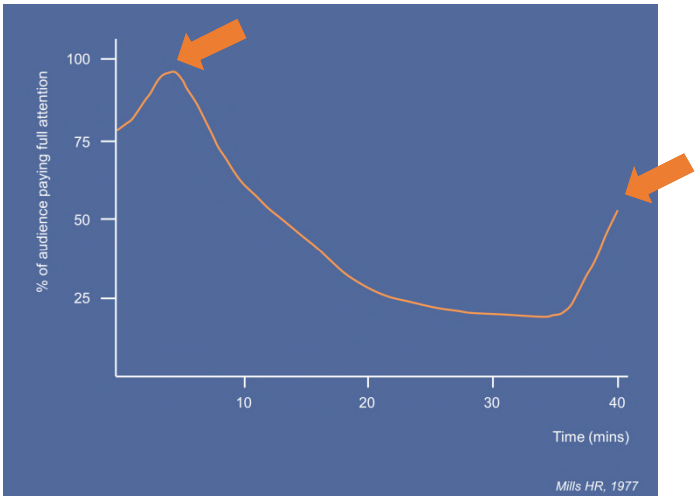
REPORT, RECORDING, AND SLIDES AVAILABLE FROM NSP

NSP | Nonprofit Support Program
HARTFORD FOUNDATION FOR PUBLIC GIVING

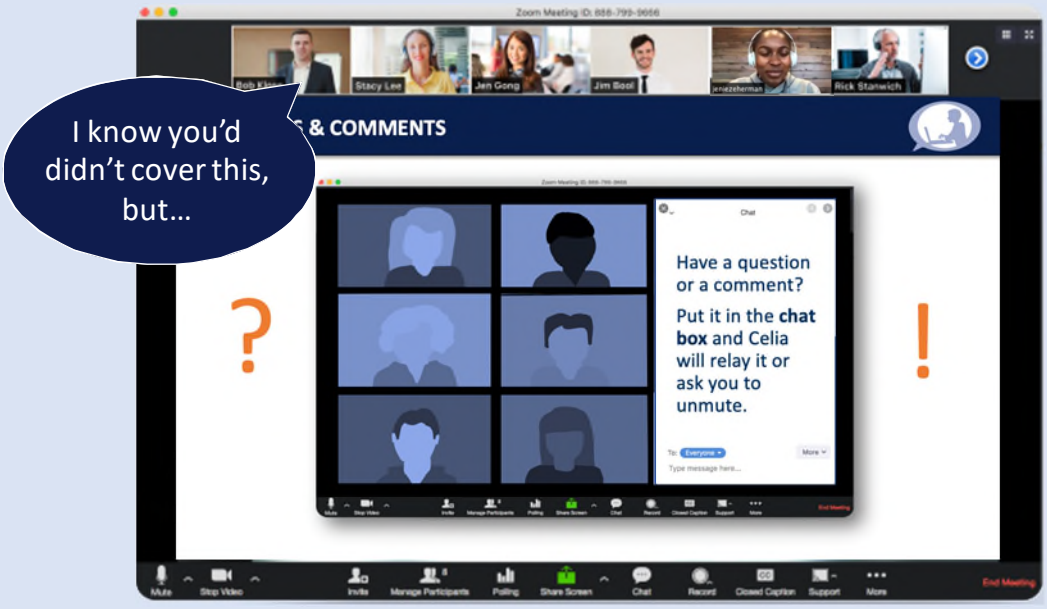
POCKET SLIDES

ADDITIONAL POINTS | Why you never end with Q&A





ADDITIONAL POINTS | Why you never end with Q&A



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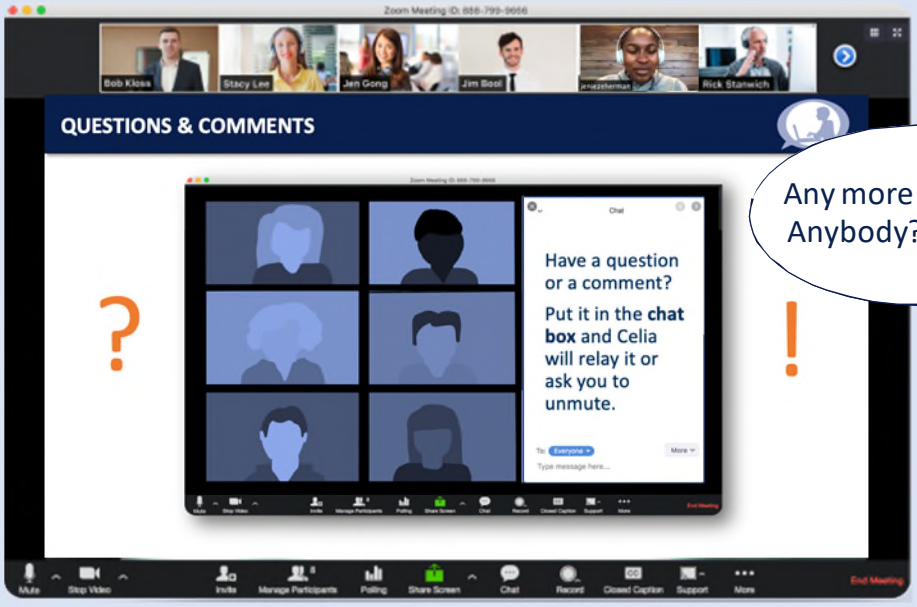

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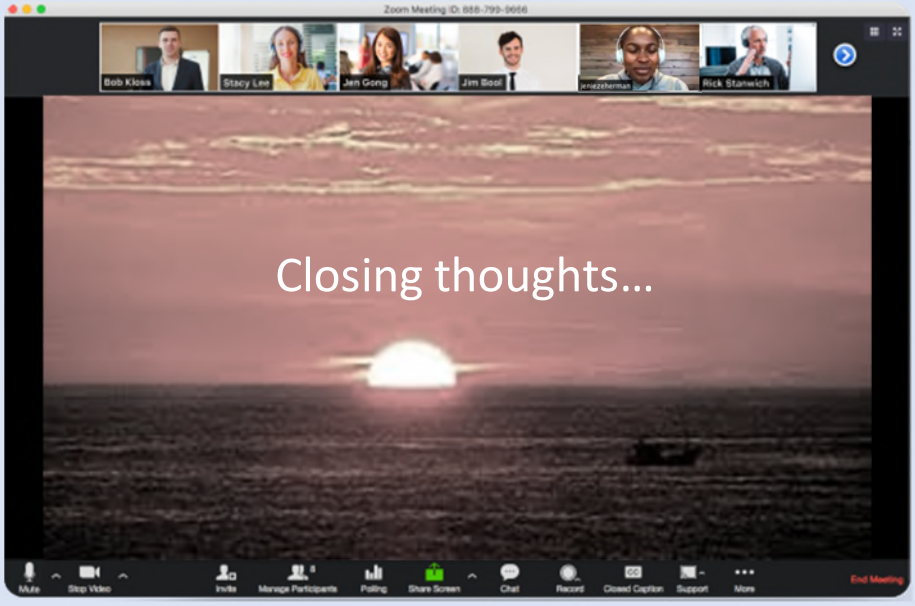
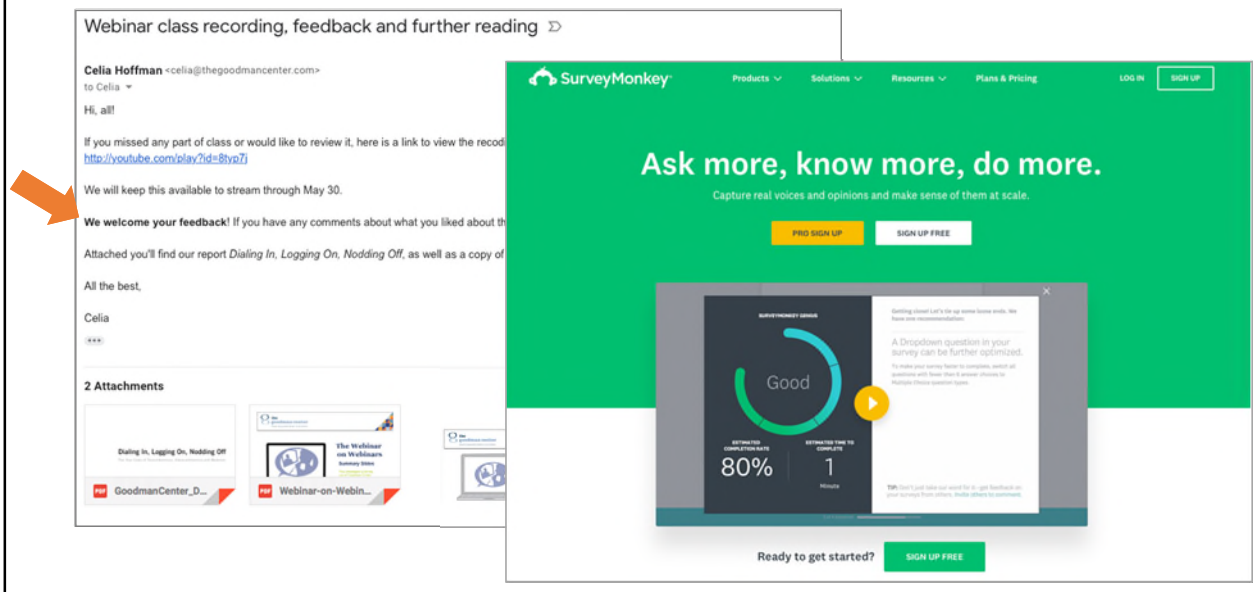


ADDITIONAL POINTS | Have a Plan B

ADDITIONAL POINTS | Get Feedback