

## GUIDE TO Virtual Meetings

### Going virtual

After over a year of remote working, we have attended scores of virtual meetings with parents, carers and young people in schools, social work, and other settings.

Some of these meetings have been excellent with positive outcomes.

Other meetings have failed to properly include the child or family at its centre and have been disappointing or even distressing as a result.

With this in mind, we've created this comprehensive guide to support you in hosting inclusive and effective virtual meetings. For some, the advice may already be second nature, but no matter the extent of your virtual meetings experience, we hope you'll find some useful hints and tips.



### The goal

We hope that by sharing our learning from the past year, we can help you to achieve the badge of excellence for all of your future virtual meetings.

As a professional, and the meeting host, the responsibility to plan and manage the meeting rests with you. Virtual meetings have become so important as an alternative to in-person meetings and they should always be considered as an option to keep people involved and informed about decisions that affect them.

**In this guide we offer tips on how to:**

- Plan and prepare for the meeting
- Conduct the meeting
- Follow up on the meeting

We've also included an [Ideal Meeting Checklist](#) at the end of this guide.

### Before the meeting

#### Plan and prepare

Preparation is key to any meeting, whether it's virtual or face-to-face. Here are a few things to consider as you plan to host yours.



## Have a clear purpose

With so many different types of meeting, it is important to be clear on why yours is taking place. This might be to address an issue, review a plan or as part of a statutory process. Make sure everyone involved is aware of the purpose beforehand to ensure the meeting stays on topic.

## Share the agenda in advance

This lets participants know what to expect which can help reduce anxiety they may have. Asking the family what they would like to be included on the agenda ensures that any points they may like to discuss are fully considered. This prevents items being missed on the day of the meeting and allows everyone involved to gather any relevant information before they attend.

## Think about timing

Too long and the meeting can lose focus, too short and there may not be enough time for all agenda items, or it may feel rushed. Let participants know how long the meeting will last beforehand. If there is a lot to discuss, consider whether it would be better to arrange two shorter meetings to give everything the attention it requires.

## Who should attend?

When planning a meeting, it's important to think about who needs to be there.

There are often lots of professionals involved in a family's life, and it might help to consider whether every professional needs to be at every meeting. Limiting attendance to key professionals can help keep things focused and make the process less daunting for families. And ask for a written or verbal update from any professionals not attending to make sure all relevant information is shared.

Although it's important to consider managing the number of attendees, many meetings require decisions to be made in order to resolve issues or progress plans. You might wish to consider having a decision-maker present – this could be a head teacher or a senior manager. Having a decision-maker at the meeting can allow decisions to be made quickly and efficiently to avoid any unnecessary delay or frustration.

When considering who to invite, it is essential to discuss with the family involved. The parents and carers or the child or young person themselves could provide valuable insight about other professionals involved or anyone they would like to attend. This can help ensure there is at least one professional present who has a positive relationship with the family to put them at ease.



**Remind parents or carers of their right to have a support person present and send them an invitation well in advance of the meeting.**

Minutes are an essential part of meetings to ensure discussions are recorded accurately and actions can be followed up. For large scale meetings, you may want a formal minute taker in attendance. For other meetings, it can be helpful to identify a chair and minute taker in advance from the team of professionals. This ensures expectations are clear and avoids delays during the meeting itself.

## Children and young peoples' participation

Children and young people have a right to take part in decision making about their lives so meetings, including virtual ones, should be as accessible as possible – preparation is key to this. Wherever possible, make sure the child is aware of the meeting and why it's taking place.

### Let them know what to expect:

- When and how it will take place?
- Who will be there?
- What will be discussed?

Children and young people may find virtual meetings daunting, making it difficult for them to contribute everything they would like. It may help to spend time with them ahead of the meeting to ask their views and what they would like to share or discuss with the rest of the team. This can help ensure that nothing is missed, and the child's views are central to the meeting, even if the child is not able to attend or share their views on the day. If they feel able to attend the meeting, give them the opportunity to share their views first and foremost so that everyone in attendance is aware of what the child or young person would like to happen.

Advocacy can be extremely useful in supporting children's participation and promoting their right to take part in decision making. Check if the child or young person has an advocate and if so, invite them to join. If not, it might be helpful to discuss a referral for an advocate with the child or young person.

## Keep it practical

Think about the best platform for the meeting. There are a wide variety of virtual meeting tools and services, and some may be more accessible than others for individuals and organisations. Another option may be a conference call, which might be more appropriate for people who don't have the technology to support video meetings or who find this environment challenging. Let all participants know in advance how the meeting will take place, whether by video or conference call and on which platform. Whatever platform you choose, make sure it's accessible to everyone involved.

Send clear joining instructions to participants. This helps make the process as straightforward as possible. Most video conferencing services provide this information online. Some platforms require installation in advance and some may require additional technology – addressing these challenges before your meeting can prevent any delay or unnecessary stress on the day. Some families might need more support to join a virtual meeting and, in these situations, it can help to offer a practice session. This can greatly reduce anxiety for everyone involved.



**A host who is confident with technology can help put all other participants at ease.**

You may want to spend time getting familiar with the platform and any features to be used in the meeting, such as screen-sharing or a chat function. Those who find this challenging may wish to organise a co-host who can facilitate the technology for the meeting. Families can find difficulties with technology anxiety provoking so preparation and confidence within the meeting can help things run more smoothly.



## Conducting the meeting

### What should your meeting look and feel like?

Knowing what to expect can help you and your participants overcome any hurdles in the virtual environment.

## Technical and practical considerations

Virtual meetings can bring a whole host of technical challenges we don't encounter in-person.

- Feedback from attendees' microphones
- Speaking over one another
- Struggling with the technology
- Poor connections

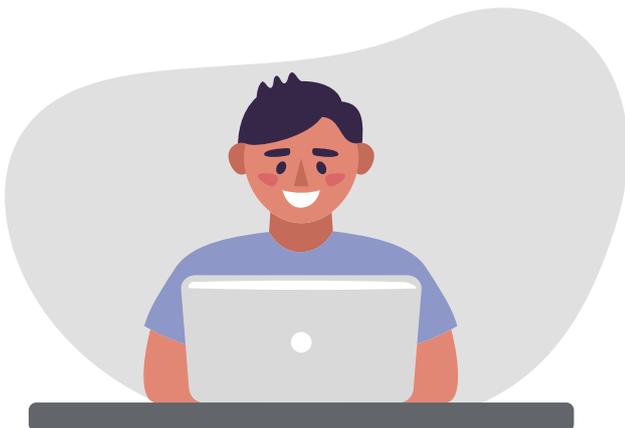
Use the beginning of the meeting to address these issues by clarifying **Housekeeping Rules**, just as you would do in an in-person meeting.

Before you jump in, make sure that everyone's technology is working and check to see if the family have any issues with the connection. This can help you to identify solutions, such as turning cameras off in a video meeting (which can improve connectivity). Don't forget to check in with attendees again during the meeting to make sure everything is still running smoothly.

Ask all attendees to mute their microphones when they are not talking to resolve feedback issues. This is particularly important for attendees who are joining the meeting from a noisy environment, and for the minute-taker who will be typing throughout.

Consider whether the 'hands up' or chat features will be beneficial for the smooth-running of the meeting and advise attendees accordingly. Bear in mind that the use of such features can change the tone, so it is important to make this decision based on the purpose of the meeting and what is appropriate for the occasion. If using the 'hands up' or chat features, make sure that parents/carers or children and young people are given the opportunity to make comments and ask questions where appropriate, even if other attendees are waiting to speak.

If you're hosting a video call, give parents/carers and any children or young people attending the option to have their camera off for the duration of the meeting if this makes them feel more comfortable. If you find that those attending have their cameras off at the beginning of the meeting or turn their camera off during a meeting, do not draw attention to this. There are many reasons why this may be the case including poor internet signal, broken equipment or other personal reasons. If you decide to keep your camera on, remember that everyone can see you and often are paying more attention to your facial expressions than they would in an in-person meeting.



**Try to keep an open and friendly expression throughout the meeting.**



## Working through the agenda

There can often be a lot of professionals involved in one family's life with a variety of reasons why, so it's important to be clear at the beginning of the meeting what will be discussed and make sure that everybody knows who is in attendance and why. Asking all attendees to give a brief introduction can be helpful to both parents/carers, children and young people and the professionals in attendance.

During the meeting, keep to the agenda that everyone has agreed beforehand, and try to give everyone the chance to speak. If during the course of the meeting it becomes apparent that there is another issue that the family would like to discuss and there isn't time to cover it, offer to arrange another meeting in the near future to discuss this.

## Ending the meeting

### Leaving with clarity

As your meeting comes to a close, it's always important to make sure everyone is on the same page.

## The round-up

This is your chance to make sure that everything on the agenda has been covered. If not, make a plan to pick up any outstanding matters. Agree with the participants whether another meeting will be arranged, or if there will be an email or phone follow-up. If there is going to be another meeting, try to agree the date there and then.

To end the meeting, give a verbal summary of the actions that will follow, and who will be responsible for each action. Let everyone know when to expect to receive the minutes, and how to give feedback on these, if required.

Don't forget to thank everyone for their attendance and their contribution to the meeting.

## Following up

After the meeting, check in with the parent, carer or young person to find out how the discussion was for them. This gives them an opportunity to share any additional issues.

If a follow-up meeting has been agreed, send the invitations promptly.

Minutes should be shared with everyone after the meeting as soon as practical, and within the time-scale agreed. If you're aware of any participant who might struggle to read or understand the minutes, consider offering to read them over together.

Finally, it can be good to reflect with a colleague on how the meeting went. Think about things that went especially well and what was more challenging. Although no two virtual meetings are ever the same, they can be very successful, and often improve accessibility and inclusion.

We know what a difference a good virtual meeting can make to the people we support and hope this guide will help you to make your virtual meetings a real success.



## Our Ideal Meeting Checklist

Yes / No / To Do

### Before the meeting:

- Is the purpose clear?
- Is everyone aware of the purpose of the meeting?
- Does the agenda make clear all the issues you want to cover?
- Has the family been asked to contribute to the agenda?
- Does the agenda have clear timings set out?
- Have you shared the agenda with everyone attending?
- Has the family been asked about who they would like to invite (including any supporter)?
- Have any decision-makers been invited to the meeting?
- Has the minute taker been appointed?
- Has the date been agreed and communicated to everyone?
- Have you checked everyone has appropriate technology?
- Have you agreed a meeting platform that suits everyone?
- As host, have you familiarised yourself with the technology, or appointed a co-host?
- Does the invitation have clear instructions about how to join the meeting?
- Have you scheduled a practice joining session with the family (if required)?
- Has a trusted adult discussed the meeting with the child/young person and sought their views?
- If the child or young person needs an advocate, has a referral been made?
- Have you invited the advocate as required?

### During the meeting:

- Have you established any housekeeping rules?
- Does the agenda allow enough time for all attendees to introduce themselves?
- By the end of the meeting, is everyone clear of actions identified and who will carry them out?
- If needed, have you arranged follow up meeting(s) or processes?

### After the meeting:

- Have you checked in with the family after the meeting?
- Have the minutes been sent, within the agreed time-scale?